

Cabinet

27 November 2018

**Name of Cabinet Member:**

Cabinet Member for Jobs and Regeneration - Councillor J O'Boyle

**Director Approving Submission of the report:**

Deputy Chief Executive (Place)

**Ward(s) affected:**

All Wards

**Title:**

Coventry Tourism Strategy

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**Is this a key decision?**

Yes - This key decision concerns the provision and approval of a Tourism Strategy for the city of Coventry, which it is anticipated will have a marked effect on communities and businesses across a number of Wards in the City.

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**Executive Summary:**

Approval is sought for a tourism strategy and destination management plan – ‘Coventry Tourism Strategy 2019-2023’.

This report (and its associated appendices) address the outcomes of 12 months of tourism research and over 70 independently conducted stakeholder interviews on the development of Coventry’s tourism offer. The adoption of the Coventry Tourism Strategy will provide a strong foundation from which to build successful tourism outcomes and economic impact from Coventry’s position as European City of Sport 2019, UK City of Culture 2021 and as a host city for the Birmingham Commonwealth Games 2022.

The proposed Strategy’s stated vision is:

*‘By 2023 perceptions and awareness of Coventry as a leisure and business tourism destination will have improved and grown and residents will be even more proud, active ambassadors of their city. The city will be recognised as a host for major events and the city will be attracting more than 10 million visitors a year’*

The proposed Strategy sets out a five year vision and strategic plan for developing the Coventry visitor experience and visitor economy, building on the unique opportunities presented by the city’s economic and industrial development alongside its place as European City of Sport 2019, UK City of Culture 2021 and role as a host city for the Birmingham Commonwealth Games. The development of the strategy has been commissioned by Coventry City Council and the Coventry City of Culture Trust with funding from the Great Place Scheme (supported by Arts Council England and Heritage Lottery Fund).

It is intended that the strategy and its underpinning delivery plans will continue to evolve over the five year journey towards achieving its vision.

**Recommendations:**

Cabinet is requested:

- 1) To approve the Coventry Tourism Strategy 2019-2023
- 2) To note the establishment of the Destination Partnership between the relevant partners and stakeholders (as set out in Appendix 4) for the purposes of overseeing and managing the implementation of the Coventry Tourism Strategy 2019-2023
- 3) To agree that the Cabinet Member for Jobs and Regeneration (or any other Elected Member that Cabinet considers most appropriate) be nominated as the Chair of the Destination Partnership
- 4) To note that the Destination Partnership will operate in shadow form for the purposes of finalising the term of references and composition of its members as set out in the Coventry Tourism Strategy 2019-2023
- 5) That delegated authority be given to the City Solicitor to finalise and approve the terms of reference for the Destination Partnership

**List of Appendices included:**

1. Coventry Tourism Strategy 2019-2023.
2. Coventry Tourism Strategy – Comparator Analysis (Report 1)
3. Coventry Tourism Strategy – Product and Audience Review (Report 2)
4. Coventry Tourism Strategy – Delivery Structure and Resources (Report 3)

**Background papers:**

None

**Other useful documents**

The following papers are posted for reference on the Coventry City Council website:  
<http://democraticservices.coventry.gov.uk/mgListCommittees.aspx?bcr=1>:

1. Destination Management Strategy – Briefing Note to the Business Economy and Enterprise Scrutiny Board (3), 17<sup>th</sup> January 2018
2. The Destination and Tourism Strategy – Minutes of the Business Economy and Enterprise Scrutiny Board (3), 15<sup>th</sup> November 2017
3. Destination, Events and UK City of Culture – Briefing Note to the Business Economy and Enterprise Scrutiny Board (3), 13<sup>th</sup> April 2016

**Has it been or will it be considered by Scrutiny?**

No

**Has it been or will it be considered by any other Council Committee, Advisory Panel or other body?**

No

**Will this report go to Council?**

No

## **Report title: Coventry Tourism Strategy**

### **1. Context (or background)**

- 1.1. Tourism in Coventry generates circa £385m of spend per annum and supports over 6,900 jobs (circa 5.9% of local employment).
- 1.2. In 2016, recognising the need for up-to-date visitor research and tourism data, Warwick Business School, supported by funding from Coventry City Council, Arts Council England and Coventry and Warwickshire Local Enterprise Partnership commissioned a comprehensive, 12-month programme of tourism research to inform the future development of a five-year Tourism Strategy.
- 1.3. Over 1,650 visitors to Coventry and over 450 online participants (including more than 200 non-visitors to Coventry) were engaged through the detailed tourism research. In addition to guiding work on the city's Tourism Strategy, this research was used to inform Coventry's successful bids for the titles of European City of Sport 2019 and UK City of Culture 2021. This research will further assist with plans for Coventry's role as a host city for the Birmingham Commonwealth Games 2022.
- 1.4. Further to the initial findings of the above tourism research, Coventry City Council and the Coventry City of Culture Trust commissioned NGI Solutions to support the development of a new five-year Tourism Strategy and Destination Management Plan (DMP) (Appendix 1) in order re-position Coventry's tourism offer through:
  - Identifying key areas for product development
  - Establishing priorities for market growth
  - Developing measures to further engage the city's population as tourism advocates
  - Developing plans for customer service improvements
  - Providing a model for commissioning in order to deliver elements of the plan
  - Providing guidance on tourism industry support needs in the city
- 1.5. Supported by NGI Solutions, the development of the Coventry Tourism Strategy has occurred across two phases:
  - **Phase 1** – structured review and audit of existing city product and information; consultation with key tourism, cultural and heritage partners
  - **Phase 2** – review of key strategies; appraisal of market and socio-economic trends; setting of strategic priorities; testing and development of a delivery model most suited for Coventry; stakeholder workshop; finalising of proposed strategy and strategic action plan
- 1.6. Over 70 stakeholders were also engaged in one-to-one consultation through the Strategy development process. A digital audit of the city's cultural assets was also undertaken in parallel.
- 1.7. Key findings from the 12-month visitor profiling research, a hotel data audit, the digital audit and over 70 stakeholder interviews suggest that Coventry has:
  - (i) a lack of digital presence
  - (ii) a current lack of coordinated marketing for its visitor offer
  - (iii) low levels of visitor spend
  - (iv) work to do to develop the city's accommodation offer and
  - (v) huge potential for growth.

- 1.8. The research findings and subsequent discussions with key stakeholders and partners have shaped the development of the Vision for a new Tourism Strategy:

*"By 2023 perceptions and awareness of Coventry as a leisure and business tourism destination will have improved and grown and residents will be even more proud active ambassadors of their city. The city will be recognised as host for major events and the city will be attracting more than 10 million visitors a year."*

- 1.9. To deliver the Vision, the proposed Strategy outlines that Coventry needs to deliver against seven measures of success:

1. Development of a successful delivery partnership to manage the Strategy / DMP
2. Increase in overall visitor numbers
3. Increase in overnight visitor numbers
4. Increase in yield per visitor
5. Growth in jobs supported by the visitor economy
6. Increase in awareness of Coventry as a visitor destination
7. Improved perceptions of Coventry as a destination

- 1.10. Developing the product offer is key to achieving the aims of the Strategy. Based on the structured review and audit of existing city product and information (see Appendix 3), the Strategy proposes a phasing of product development and new campaigns concerning the following product areas:

- Iconic Buildings and Architecture
- Medieval History and Stories
- Family Fun (including the new waterpark 'The Wave')
- Conferencing in Coventry
- Sport, Dance and Wellbeing (including European City of Sport and the Commonwealth Games)
- Home of the Bicycle, Car and Taxi
- Coventry City of Culture 2021
- Music
- Independent Shopping
- Food and Drink
- Industrial / Technological Tourism (working with businesses to attract visitors)

- 1.11. The development of product sits alongside wider developments within the city and improvements to the visitor offer and experience, such as the enhancement of the city's retail, food and beverage offers; improvements to public realm; improvements to the city's digital infrastructure; and investment into transport and highways infrastructure. Furthermore, the role of the city's residents, institutions and businesses in advocating and promoting the destination is also key to its developing profile – for example through growing overnight stays through the 'visiting friends and relations' (VFR) sector.

- 1.12. The Strategy further proposes a new partnership structure for the strategic coordination and delivery of Tourism in Coventry. The Strategy recognises that Coventry needs its own voice and that no single organisation in the city is equipped to develop and drive tourism and the visitor economy on its own. However, it notes that there are a range of effective partners delivering on aspects of the visitor economy and therefore recommends that a Destination Partnership commissioning model is adapted.

- 1.13. The proposed Destination Partnership – facilitated and supported by Coventry City Council – would bring together key tourism partners and stakeholders (including from the public and private sectors; from hospitality, conferencing, education and skills sectors) to make the decisions on who is best placed to lead the various work strands outlined in the Strategy. The proposed core roles of key delivery organisations within the Destination Partnership are also outlined within the Strategy.

## **2. Options considered and recommended proposal**

### **2.1. Option 1 - No Tourism Strategy (Not recommended)**

- 2.1.1. The proposed Tourism Strategy for Coventry notes that the city has - in the coming years - a once in a lifetime opportunity to develop its visitor economy and increase the sector's contribution to the wider city economy. The forward absence of an approved Tourism Strategy, dedicated Destination Partnership and management plan for the visitor economy would limit the ability of key agencies (including the City Council) to maximise the opportunities offered by the city's current regeneration developments and position as European City of Sport 2019, UK City of Culture 2021 and as a host city for the Birmingham Commonwealth Games 2022.
- 2.1.2. The absence of a Tourism Strategy for the city could further negatively impact on the city's ability to drive a direct economic benefit from holding key national and international titles and from hosting key events.
- 2.1.3. The absence of a clear Destination Partnership would further potentially limit the opportunities for the city to coherently and consistently engage key national and regional partners and access national funding opportunities.
- 2.1.4. For these reasons, particularly within a climate where there is reduced and finite resources available to local authorities to support tourism and destination activities, continuing without a strategy that sets out the principles and priorities for partnership activity and investment in tourism is not recommended.

### **2.2. Option 2 – Approve a Five-Year Tourism Strategy (Recommended)**

- 2.2.1. Approving the Coventry Tourism Strategy 2019-2023 will confirm the strategic direction and priorities for tourism in the city and support the city in prioritising activities and partnerships to raise its profile locally, regionally, nationally and internationally.
- 2.2.2. Already in the city partner resources have been combined to good effect in supporting bidding and build-up activity for Coventry 2021 and securing development and delivery resources.
- 2.2.3. Approving the Strategy will show recognition of the wide range of benefits that both leisure and business tourism can bring to the city in securing social and economic outcomes articulated in the city's Sports Strategy, Cultural Strategy, and UK City of Culture bid documentation. The Strategy and Destination Partnership it proposes will provide the platform for securing the direct tourism benefits projected from Coventry's future years in the national spotlight – including through the European City of Sport 2019, UK City of Culture 2021 and as a host city for the Birmingham Commonwealth Games 2022.

### **3. Results of consultation undertaken**

- 3.1. Structured tourism research was carried out in 2016/17 with over 1,650 visitors to the city and over 450 online respondents, at least 200 of whom had not been to the city before. The following is a summary of findings from the detailed survey work.
- 3.2. 94% of surveyed visitors to Coventry said they would recommend Coventry to a friend for a visit or day trip and 95% said they would visit Coventry again. Visitors said what they most liked about Coventry was its history, Cathedral[s], universities and friendly people. 32% of visitors said that their experience of the city exceeded their expectations, with only 7% expressing disappointment.
- 3.3. Less positively, 77% of non-visitors said they hadn't visited because they were 'not sure what's there'. 20% of surveyed non-visitors said they would never consider visiting Coventry (this was prior to the UK City of Culture and European City of Sport title announcements), which was the same percentage for destinations such as York, Bath and Bristol and was less than for cities such as Birmingham, Sheffield, Liverpool, Glasgow, Durham, Edinburgh, Cardiff, Manchester and Leeds.
- 3.4. Whilst Coventry already attracts nearly 8 million visits per annum, visitor spend is low compared to comparator cities (see Appendix 2). The city clearly needs to encourage people to stay longer and spend more whilst they are in Coventry (e.g. in venues, cafes, bars, retail etc.). The lowest scoring elements in the visitor satisfaction survey were 'Nightlife' and 'Variety of Things to Do', though the research suggests awareness of the variety of visitor attractions and activities the city has to offer was not well understood. Litter and cleanliness were the main things visitors wanted to see improved.
- 3.5. The 70 stakeholder interviews independently undertaken by NGI Solutions during Phase 1 of the Strategy development process canvassed views and perspectives from a wide range of stakeholders – including heritage, culture, tourism, hospitality, economic development, business and media partners.
- 3.6. From the initial research and the stakeholder interviews, NGI Solutions provided a SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) which is included in the Strategy document. From this analysis, the Strategy proposes the themes, products and markets that Coventry should prioritise – the development work for which is outlined in Appendix 3 – Product and Audience Review (Report 2).
- 3.7. Also based on the findings of the stakeholder interviews, combined with comparative analysis with other cities or destinations (Appendix 2), the Strategy further makes recommendations around the future structure and resourcing of destination management in Coventry. The analysis guiding these recommendations is considerate of the diversity in destination management arrangements across a range of comparator cities or towns (Appendix 4 – Delivery Structures and Resources).
- 3.8. Finally, key stakeholders were consulted on the key findings and recommendations of the Strategy in September 2018, prior to its proposal.

### **4. Timetable for implementing this decision**

- 4.1. Subject to approval of the recommendations contained within this report, The Coventry Tourism Strategy be adopted as policy with immediate effect, with a planned delivery period of five years (2019-2023 inclusive).

- 4.2. Work to develop the Destination Partnership Board will commence with immediate effect with a detailed action plan (with confirmed delivery agency commitments) being an early priority (see 'Priorities and Actions' listed within the Strategy).
- 4.3. The proposed Strategy covers a five-year period, and although the Strategy will guide tourism activity and the development of Coventry as a destination, it will not be allowed to constrain development where further change is needed to ensure that Coventry is able to maximise the benefits presented by the opportunities that lie ahead in the next five years. Over the lifetime of the strategy, there will regularly evaluation to assess progress and align action plans to changes in local, regional or national policies. To monitor and measure progress in delivering the strategy, a wide range of data sources will be used.

## 5. **Comments from the Director of Finance and Corporate Services**

### 5.1. **Financial Implications**

The staffing resource exists within the current team structure to cover the appointment of the Destination Partnership Manager to support the Strategy. However, based on the recommendations of the study, there is a need for an additional £100k - £150k per year 'to provide leverage and delivery of its own programmes'. These resources are not currently provided for Tourism and Destination Management within the Council's approved revenue budget. It is proposed that £100k per year is earmarked for the years 2019/20 – 2022/23 from the indicative City of Culture readiness programme resources of £6.1m, subject to its final approval as part of the budget setting process which will be formally approved by Council in February 2019.

Any specific actions itemised within the proposed action plans which have financial implications over and above existing resources will need separate approval as appropriate.

### 5.2. **Legal implications**

There are no legal implications associated with this report.

## 6. **Other implications**

### 6.1. **How will this contribute to the Council Plan ([www.coventry.gov.uk/councilplan/](http://www.coventry.gov.uk/councilplan/))?**

The recommended proposal will contribute to the Council's aims of:

- **Raising the profile of Coventry through promoting Coventry as a visitor destination (including through arts, sports and cultural opportunities)** – The Tourism Strategy (also referred to as a Destination Management Plan) is a shared statement of intent to manage Coventry as a destination and its tourism offer over a set period of time. The Strategy aims to address the need for the city to improve the way it promotes itself as a major tourist destination and as a result, through a better articulated tourism offer, successfully attract more visitors, increase spend and secure and sustain new businesses and investment.
- **Making the most of our assets and supporting businesses to grow** – The Strategy proposes the development of a new partnership approach to growing the tourism offer and the city's visitor economy. This approach builds on the products and venues the city already has to offer, seeking to raise their profile

and grow the visitor economy through both increasing visitor numbers and levels of visitor spend.

#### **6.2. How is risk being managed?**

In order to mitigate any associated risks with the delivery of the Strategy over its lifespan, it is proposed delivery will be monitored through the (new role of) Destination Partnership Manager, reporting to the Destination Partnership. It is proposed this will include an annual review of progress and against a confirmed action plan approved with the Partnership and key partners.

#### **6.3. What is the impact on the organisation?**

Approval of the report recommendations would secure an adopted five-year Coventry Tourism Strategy.

Approving the Coventry Tourism Strategy 2019-23 will confirm the strategic direction and priorities for tourism in the city and support the City Council in seeking and creating partnerships with other significant stakeholders in developing Coventry as a more culturally attractive, vibrant and prosperous place to live work and enjoy though a partnership delivery model. Approving the Strategy will further show recognition of the wide range of benefits that business and leisure tourism can bring, in providing both social and economic benefits for the city.

From a City Council perspective, it is anticipated that the Strategy will deliver benefits for the city that support service objectives across the Directorates, including:

- The development of a new city-wide partnership approach to growing the visitor economy, which improves access to commissioned budgets, partner resources and external funding for a range of cultural organisations, activities and events across the city
- A revitalised and clear tourism offer that increases the perception of the city as a major tourism destination within the West Midlands and successfully attracts new business and investment.

There are no HR implications for the organisation as these proposals will not affect City Council employees.

#### **6.4. Equalities / EIA**

No negative impact of protected groups or concerning the three aims of the general duty is anticipated. The Tourism Strategy identifies how structured investment can support and promote the delivery of the city's Sports Strategy, Cultural Strategy and City of Culture plans, which all commit to ensuring that the priority groups are more included in the cultural life in the city.

#### **6.5. Implications for (or impact on) the environment**

If the Tourism Strategy is approved by Cabinet, the environmental impact and mediating influences relating to any resultant capital schemes and the projected increase in visitor numbers will be considered within the context of the Council's City Readiness programme.

## **6.6. Implications for partner organisations?**

The proposed Coventry Tourism Strategy 2019-2023 is a document developed through consultation with a range of stakeholders and proposes a partnership approach to delivering the Strategy.

Approving the Coventry Tourism Strategy 2019-2023 will confirm the strategic direction and priorities for developing the visitor economy in the city and will further show recognition of the wide range of benefits both business and leisure tourism can bring.

Approval of the Strategy will give confidence to external funders that the city has clear objectives and priorities for growing its visitor economy in the next five years. This should assist the proposed Destination Partnership and wider partners in applying for external grant funding and will bring greater coherence in the links from tourism to wider city agendas (e.g. community cohesion, jobs and economy, regeneration).

The proposed formation of a Coventry Destination Partnership will provide a coordinated, partnership body that can advocate for and speak on behalf of the visitor economy and associated industries across the city, from a wider perspective than any one partner.

**Report author(s):**

**Name and job title:**

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Member: Councillor Jim O'Boyle	Cabinet Member for Jobs and Regeneration		02/11/18	05/11/18

Coventry Tourism Strategy  
2019-2023

## **Introduction**

Coventry has had an extraordinary year. Wind the clock back 12 months and arguably not many people would have anticipated that the UK's next City of Culture would also be hosting the next Commonwealth Games, picked as a key location for 2018's biggest music event and identified as European City of Sport 2019. Furthermore, the Great Places and Cultural Destinations projects have secured an additional £2million for the city and are laying some important foundations that will boost the numbers and dwell time of visitors. Nationally and internationally, Coventry's reputation as a potential destination for visitors is growing and this should provide the catalyst for the city to develop its tourism ambitions and infrastructure. This Tourism Strategy (also referred to as the Destination Management Plan, or DMP) aims to ensure Coventry maximises these opportunities.

## **What is a Tourism Strategy / Destination Management Plan (DMP) and why does Coventry need one?**

Over the last decade, the importance of tourism as an economic development tool has been recognised at a local and national level. Therefore, tourism is now more commonly referred to as "the visitor economy" in recognition of its potential to drive jobs and economic growth.

A partnership strategy / DMP is a shared statement of intent to manage a destination and its tourism offer over a set period of time, identifying key stakeholders and clear actions they will take to improve the destination.

This is a critical time for the development of the visitor economy in Coventry. There is currently a once in a lifetime opportunity to make a dynamic shift in perceptions of the city and to increase both visitor numbers and expenditure to develop the visitor economy contribution to the overall economy of the city. The Strategy will provide a clear roadmap of the steps required to ensure the city maximises all opportunities to develop a sustainable offer over the next five years.

A DMP needs to be concise and digestible so Coventry's Tourism Strategy (this document) is supported by three additional reports that should be read alongside this to gain a true understanding of Coventry's visitor economy.

The Coventry Tourism Strategy was commissioned by Coventry City Council and the Coventry City of Culture Trust and has been developed in consultation with public and private sector groups and organisations who impact on the Coventry's visitor economy. It will be managed by the Destination Partnership enabled by Coventry City Council. It should also be set within a context of wider regional and national organisations such as the West Midlands Growth Company and Visit Britain who influence the geography, funding and partnerships within which Coventry will need to operate.

This Strategy has been developed using information gathered from:

- 12 months visitor profiling research undertaken in 2016/17
- Hotel data audit undertaken in 2018
- Consultation with over 70 organisations and individuals with a stake in Coventry's visitor economy undertaken in 2018.

Key findings from this information suggests that Coventry has:

- a lack of digital presence.
- a lack of coordinated marketing for its visitor offer.
- low levels of visitor spend.
- work to do to develop the city's accommodation offer.
- huge potential for growth.

## The Vision

***By 2023 perceptions and awareness of Coventry as a leisure and business tourism destination will have improved and grown and residents will be even more proud active ambassadors of their city. The city will be recognised as host for major events and the city will be attracting more than 10 million visitors a year.***

## Targets

To deliver the Vision, Coventry needs to deliver against seven measures of success:

- Development of a successful delivery partnership to manage the Strategy
- Increase in overall visitor numbers
- Increase in overnight visitors
- Increase in yield per visitor
- Growth in jobs supported by the visitor economy
- Increase in awareness of Coventry as a destination
- Improved perceptions of Coventry as a destination

In order to achieve the following targets:

Measure	Current position 2018	Target 2023	Notes
Overall visits	7,974,000	10,280,901	Additional 1 million visits generated and sustained from City of Culture 2021
Overnight visits	8%	15%	Coventry will be a well-recognised city for short breaks
Day visitor spend	£27.77	£40	Improved product and awareness offer greater opportunities to spend
Overnight visitor spend (per trip)	£119.42	£140	

A robust monitoring framework needs to be established to regularly review the Strategy against its priorities and targets. This will include the measurement against Key Performance Indicators (KPIs) such as visitor numbers and expenditure as well as changes in perception and awareness

of Coventry.<sup>1</sup> Most successful destinations deliver against an incremental growth target that would be set against both visitor numbers and expenditure, however the period of this Strategy (from 2019 to 2023) means that the catalyst of European City of Sport 2019, City of Culture 2021 and Commonwealth Games 2022 will have a significant impact. Therefore, Coventry's targets and measures of success for its visitor economy in 2023 must reference and include these elements.

## **Strategic Context.**

It is important to understand the national, regional and local context in which Coventry operates and to identify opportunities at all levels from which Coventry can benefit.

### **National**

At a national level the strategic direction for tourism is driven by Visit England and Visit Britain. Visit Britain is the national tourism agency responsible for promoting Britain worldwide. Visit Britain will provide Coventry with opportunities to promote the city to a global audience through activity such as press trips and online marketing. Visit Britain have recently submitted the Tourism Sector Deal to Government to be part of the Industrial Strategy, with key priorities that include:

- A 10-year tourism and hospitality skills campaign
- Boosting productivity
- Improving connections for overseas and domestic visitors
- Creating tourism zones that will allow the development of a quality tourism product

Visit England markets England both domestically and to well established overseas markets. Visit England also have a specific remit to improve the product of England's tourism destinations through funds such as the Discover England project. Having a Strategy / DMP gives Coventry the opportunity to work with Visit England and explore opportunities to promote and fund the City through their channels.

### **Regional**

Coventry and Warwickshire Local Enterprise Partnership (CWLEP) outlines culture and tourism as a strategic priority with a focus on maintaining and growing cultural and tourism assets. CWLEP investment will primarily focus on joining up public spaces, improving transport links and developing skills in the tourism and culture sector. The CWLEP is also keen to showcase Coventry to the world during City of Culture 2021 and use the event to boost the economy across the entire CWLEP region. The West Midlands Growth Company is responsible for supporting the delivery of the West Midlands Combined Authority Strategic Economic Plan by attracting investors and visitors. The Growth Company is keen to play a role and support Coventry's development as a destination and has considerable resource and expertise that the city can benefit from. The

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<sup>1</sup> Measures of Success to be monitored via Cambridge or STEAM economic impact model (biannually) and visitor surveys (in 2019,2021,2023). STEAM would be the recommended model as it provides data at a more local level.

Strategy articulates reasons for the city to be involved in decision making and activity at a regional level where it makes sense for Coventry to do so.

## **Local**

There are a number of plans within Coventry that the Tourism Strategy is well placed to support and align with. These include:

- **Coventry City Council Plan 2016-2024** - The Strategy will support Coventry City Council's aspirations to develop the city centre, raise the profile of Coventry, offer arts, sport and cultural opportunities and to empower citizens
- **Coventry Cultural Strategy 2017-2027** - The visitor economy and culture go hand in hand and developing product for visitors, developing itineraries and trails will all contribute to the successful delivery of the Cultural Strategy.
- **Coventry Sports Strategy 2014-2024** - The Strategy will provide a framework to jointly market sport and culture as well as encouraging residents to explore the city, improving wellbeing and supporting sporting infrastructure (e.g. 'The Wave' destination Water Park that will also attract visitors from across the region).

## SWOT Analysis

The Tourism Strategy needs to maximise Coventry's strengths, take advantage of opportunities and negate any weaknesses and threats. The process of developing and articulating the Strategy provides useful intelligence for partner organisations to deliver the actions and ultimately deliver the vision of the Strategy. Coventry's SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) has been consolidated into the diagram below:



## Themes, Products and Markets

Developing the product offer is key to achieving the aims of the Strategy. A ‘roadmap’ approach is proposed to phase the development and promotion of the key themes that Coventry should use to package product to attract new and develop existing audiences. The development work for this section can be found in the accompanying **Report 2**.

Coventry’s visitor data demonstrates that there is currently a low awareness of the product offer with very few visitors being able to name more than two attractions. There is also a disconnect between the audience profile of Coventry and its product offering. Currently the most recognised product offer appeals to an older audience while the current visitor profile is much younger. This provides Coventry with a significant growth opportunity.

Consultation and existing research has identified that by 2023, through product development and catalytic events such as Coventry 2021 and the Commonwealth Games, Coventry will appeal to a wider range of visitors and have a product offer to match.

There are two parallel jobs to be done. The first is to ensure the existing products concerning heritage and architecture are developed, packaged and marketed to their full potential. The second is to develop a new product offer around themes that will be driven by the exciting developments Coventry has planned across the next five years. Highlights include:

- Opening of The Wave (city centre water park)
- European City of Sport 2019 and a growing sporting offer (including Rugby Union, Rugby League, Football, Netball, and Ice Hockey)
- Coventry Evening Telegraph Building transformation into a Boutique Hotel
- Drapers Hall development as a new music and entertainment venue
- Coventry City of Culture 2021
- Commonwealth Games 2022

Investment in the product of Coventry needs to be supported by wider co-ordination and investment in the place to ensure that the overall visitor experience fulfils the promise of the reasons to visit listed above. For example, if a first-time visitor to Coventry in 2021 can’t park, navigate the city or find somewhere to eat, their overall experience and likelihood to return will be diminished regardless of the success of the City of Culture.

Over the next five years, identifying the themes that Coventry can use to structure and package its offer will contribute to an increase in both the volume and value of tourism for the city. It is proposed that a phased ‘roadmap’ approach to product development and marketing is taken, structured around the themes of:

- Iconic Buildings and Architecture
- Medieval History and Stories
- Family Fun (including the new waterpark ‘The Wave’)

- Conferencing in Coventry
- Sport, Dance and Wellbeing (including European City of Sport and the Commonwealth Games)
- Home of the Bicycle, Car and Taxi
- Coventry City of Culture 2021
- Music
- Independent Shopping
- Food and Drink
- Industrial / Technological Tourism (working with businesses to attract visitors)

The ambition of the Strategy is that Coventry will be attracting and sustaining 2.3 million additional visitors by 2023. These visitors will change over the lifespan of the Strategy and the ambition by 2023 would be that Coventry is recognised as a UK short break destination.

Key infrastructure developments and a strengthened product offer and event programme will see a diverse visitor audience travelling to Coventry for day and overnight trips.

At the beginning of the DMP journey it is helpful to categorise Coventry's potential and existing visitors into three groups.

- Day Visitors including local residents
- Overnight visitors including SFR (Staying with Friends and Relatives)
- Business visitors

Report 2 provides wider analysis of the opportunities each product theme offers for each audience.

As an emerging destination, Coventry already attracts each of these audiences but with the product development opportunities outlined above there is significant opportunity to grow each group in order to achieve the ambitious growth targets for 2023.

## Structure

Coventry needs its own voice. There is neither the resource or desire for a standalone Destination Management Organisation and consultation suggests that no single organisation within the city is equipped to drive tourism on its own. However, there are a range of effective partners delivering on aspects of the visitor economy and it is therefore recommended that a partnership commissioning model is adopted.

The Destination Partnership, facilitated by Coventry City Council, will make the decisions on who is best to lead the various work strands of the Strategy. These may flex and change over time. There are significant ongoing responsibilities for the City Council who have the appetite and some resources to support this, but many roles will be delivered by external agencies such as the Coventry City of Culture Trust, West Midlands Growth Company and other partners. A summary of the proposed partnership strategic and delivery structure is outlined in the diagram below.

## Structure

Delivering the Destination Management Plan requires the expertise, resource and funding of a range of stakeholders. The Destination Management Plan will be delivered via a destination partnership containing the organisations outlined here.

The partnership will deliver greater collaboration between stakeholders in order to maximise the resources and people driving and delivering Coventry's visitor economy.

More details around the proposed structure and resources can be found in the accompanying report 3.

### STRATEGIC



- Manage and service the partnership
- Drive digital strategy and infrastructure
- Drive action plans
- Ensure partners are delivering
- Develop formal connections with strategic regional partners (e.g. LEP, WMGC)
- Research funding ops
- Develop relationships with key delivery partners, e.g. Visit Britain/Visit England
- Commission and oversee independent reviews/studies such as Business Visits and Events review and Accommodation study
- Review and update DMP

### DESTINATION PARTNERSHIP – maximising resources and collaboration

#### DELIVERY



- Physical welcome to city
- Interim business tourism delivery with view to potential delivery of new solution
- Liaison with city council departments
- Tourism industry liaison
- Delivery of destination platform content
- Resident engagement
- Product improvements e.g. St Mary's
- Accommodation / product development
- Advocacy on visitor economy / tourism value with city council departments
- Develop Group Travel offer
- City presentation (inc cleanliness and wayfinding)



- Build up, delivery and legacy of Coventry City of Culture 2021
- Drive implementation of digital audit
- What's on / content / box office system
- Cultural programming for 2021 and legacy
- Delivery of Great Places and Cultural Destinations scheme
- Resident engagement through culture



- Product development – food and drink and retail specific – including customer service initiatives for these businesses
- Development of Coventry's Night Time Economy
- City centre events



- Potential research capacity
- Research and evidence provision
- Sector skills and producing tourism and hospitality professionals
- Business visits and events
- International VFR
- Student ambassadors



- Regional and national partnerships including VisitEngland / VisitBritain
- Regional / national campaigns (leisure, business, group travel and travel trade)
- Transport packaging
- Commonwealth Games interface
- Attract and disperse via Birmingham
- Research through WMGC Databank

#### OTHERS



The organisations that form the Destination Partnership already deliver a range of functions that support Coventry's tourism offer:

- Marketing
- Communications
- Research
- Visitor Experience
- Information

One of the main benefits of the Partnership is to encourage wider collaboration and coordination so that the whole becomes greater than the individual parts.

## Priorities and Actions

The actions and activity required to deliver the Strategy's vision have been captured under four work areas. The 4 "P"s and associated actions and activity are outlined in the table below. The Destination Partnership will oversee these work areas with activity delivered by key city partners or commissioned via Coventry City Council.

Work Area	Actions / Activity
<b>Partnership</b> - the development of the Destination Partnership and associated delivery structure is crucial to the development of Coventry's visitor economy. The Partnership should contain organisations who impact on and can put resources to Coventry's visitor economy.	<ul style="list-style-type: none"><li>• Employ / allocate Strategy/DMP coordinating role – Destination Partnership Manager based in Coventry City Council</li><li>• Establish Destination Partnership with clear governance, terms and conditions, and Chair.</li><li>• Agree roles and responsibilities of partner organisations.</li><li>• Agree projects for Year One and potential funding sources for delivery.</li><li>• Develop sub groups to take / develop key areas (i) business visits and events (ii) events strategy and (ii) business engagement activity (see Year One priorities on Page 15)</li><li>• Develop digital framework and partnership based on Digital Audit recommendations that will support all of the work areas.</li></ul>
<b>Product</b> – Developing current and identifying new product ( <b>based on robust research</b> ) that will encourage an increase in visits and greater spend per visitor	<ul style="list-style-type: none"><li>• Development of packages for key product themes identified.</li><li>• Accommodation study to inform future developments.</li><li>• Prioritise capital developments in line with product themes</li><li>• Review Business and Events offer (via sub group) to identify key developments required in this area, both in infrastructure and packaging.</li><li>• Development of event strategy or event wish-list to continue momentum and reason to visit after City of Culture 2021 and the Commonwealth Games 2022 that builds on existing events and ensures that Coventry is an event-ready city.</li><li>• Agree product development plans around themes (Family Fun, Sport, Transport, Music). Signpost to training and development opportunities for front line staff to improve skills and service.</li></ul>

<p><b>Place</b> - There is work to do to improve Coventry as a place to visit which means that visitors are welcomed and can easily orientate themselves.</p>	<ul style="list-style-type: none"> <li>• Build on the Great Places programme to develop:           <ul style="list-style-type: none"> <li>◦ Trails and routes to tie product themes together.</li> <li>◦ Wayfinding and signage project.</li> <li>◦ Mapping and itinerary development</li> <li>◦ Welcome Training</li> </ul> </li> <li>• Develop a visitor information strategy and implementation plan that puts the visitor at the heart of the offer and puts appropriate information in areas of high visitor foot fall.</li> <li>• Develop digital skills and the digital capacity of tourism businesses and partners. ,</li> <li>• Develop a comprehensive centralised listings database</li> <li>• Prioritise gateway improvements (particularly the railway station)</li> <li>• Identify visitor hotspots and city gateways and ensure that street cleaning and public realm strategies and delivery tie in with these.</li> <li>• Maximise the catalyst of UK City of Culture to complete the Cultural Strategy cultural capital priorities, identifying projects for investment in the short term to 2021 and for longer term capital, public realm and public art product.</li> </ul>
<p><b>Positioning</b> – Coventry needs to define and explain its offer based on the product and markets reflected in the Strategy.</p>	<ul style="list-style-type: none"> <li>• Develop a bank of key messages and photography to use when positioning Coventry to visitors.</li> <li>• Complete Creative Tourist digital audit recommendations.</li> <li>• Apply the centralised listing database to partner websites, digital itineraries and other key information channels.</li> <li>• Develop an ambassadorial culture amongst residents, students and businesses to ensure they are Coventry's biggest and loudest supporters.</li> <li>• Ensure that partners' marketing and PR campaigns position Coventry as a visitor destination.</li> <li>• Develop potential day and overnight visitor campaigns with key partners.</li> <li>• Ensure Coventry is cohesively taken to market as a business visits and events destination.</li> </ul>

## **Underpinning the Strategy**

To ensure the successful delivery of the Strategy there will be two cross cutting objectives:

- **Research** – the recommendations in the Strategy have been developed from robust research. These baseline studies, including Economic Impact Modelling and visitor surveys must be regularly repeated and additional information developed over the lifetime of Strategy - such as an Accommodation Study and a tourism GVA study which should both be undertaken. More work needs to be done to identify and resource methods of monitoring city performance on an ongoing basis. The work by the two universities (Coventry University and the University of Warwick) on a City of Culture research programme should allow the city to become an exemplar in visitor research. The city may wish to explore moving to the STEAM model for evaluation on a two or three-year cycle and putting in place rigorous monitoring of hotel and attraction data. The work by Creative Tourist recommends various actions to better measure the city's audiences.
- **Wider collaboration** – By 2023 Coventry will be seen as a visitor destination in its own right. However, to get there, collaboration is critical. This is particularly important when looking to attract funding for future projects as cross boundary / cross regional projects are much more likely to gain traction. Through the Destination Partnership, Coventry will identify opportunities for joint working with key strategic delivery partners such as the Coventry and Warwickshire Local Enterprise Partnership, West Midlands Growth Company and Shakespeare's England.

## **Year One Priorities:**

In order to focus the Destination Partnership and ensure it “hits the ground” running, the proposed priorities have been identified to guide activity in 2019 (Year One). The subsequent action plan maps the priorities and actions over this and the following four years:

Year One Priority	Priority Actions and Activity
Partnership – to establish a clear set of partnerships to deliver Strategy actions	<p>All the actions allocated to the Partnership work area should be a priority in Year One. In addition, underpinned by the proposed digital framework the sub groups should focus on:</p> <ul style="list-style-type: none"><li>• Business Visits and Events (BVE) – undertake a review of BVE activity to identify the most advantageous approach to take Coventry to this market.</li><li>• Events – lead the development of a City Events Strategy building on recent success that identifies national and international events to bid for and develops criteria for growing Coventry-specific events.</li><li>• Business Engagement – develop a programme of activity to engage the wider business community in the Strategy and associated activity and to create local ambassadors.</li></ul>
Making Coventry Welcome	<p>Coventry will engage with its local population to develop civic pride giving residents the tools to become the city’s best ambassadors via initiatives such as:</p> <ul style="list-style-type: none"><li>• Coventry Card (or equivalent resident card)</li><li>• Residents’ Festival</li><li>• “What’s On Your Doorstep” marketing campaign</li></ul> <p>Coordinating the Place work (Page 13) to:</p> <ul style="list-style-type: none"><li>• Provide an improved welcome at ‘Gateways’.</li><li>• Improve visitor information provision.</li><li>• Improve wayfinding and public realm.</li><li>• Upskill frontline staff digitally and to deliver a warm and informed welcome.</li><li>• Improve city cleanliness</li></ul>

Understanding Accommodation	<p>Commission an accommodation study that:</p> <ul style="list-style-type: none"><li>• Builds on the current product audit to get a true understanding of Coventry's current accommodation market and potential.</li><li>• Guides strategic investment so that development is sustainable and appropriate.</li><li>• Provides an investment proposition for potential developers.</li><li>• Informs Coventry City Council's planning processes.</li><li>• Forms part of the capital prioritisation study</li></ul>
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## Strategy Action Plan

***'By 2023 perceptions and awareness of Coventry as a leisure and business tourism destination will have improved and grown and residents are proud and active ambassadors for their city. The city will be recognised as host for major events and the city will be attracting more than 10 million visitors a year.'***

In order to achieve this vision, the Strategy work areas have been mapped over the five year period of the Strategy / DMP.

Objectives	2019	2020	2021	2022	2023
<b>Partnership</b> - the development of the DMP Partnership / delivery structure is crucial to the development of the rest of the DMP. The Partnership Board should contain organisations who impact on and can put resources to Coventry's Visitor Economy.					
Employ / allocate DMP coordinating role – Destination Manager and agree host organisation for this role based on recommendations.	✓				
Establish Destination Partnership Board with clear governance, terms and conditions and Chair.	✓				
Agree roles and responsibilities of partner organisations.	✓				
Agree projects for year one and potential funding sources for delivery	✓				
Develop Board sub groups to take develop business visits and events, events strategy and business engagement activity.	✓	✓	✓	✓	✓
Develop digital framework and partnership based on Digital Audit recommendations that will support all of the work areas.	✓	✓			

Objectives	2019	2020	2021	2022	2023
<b>Product</b> - the DMP identified new and existing product that can be further developed and focussed to provide reasons to visit and stay in Coventry.					
<ul style="list-style-type: none"> <li>○ Development of packages for key product themes identified.</li> <li>○ Prioritise capital developments</li> <li>○ Accommodation study to inform future developments.</li> <li>○ Review Business and Events offer (via Board sub group) to identify key developments required in this area both in infrastructure and packaging.</li> <li>○ Development of event strategy or event wish list to continue momentum and reason to visit after 2021 and Commonwealth Games that builds on existing events and ensuring Coventry is an event ready city.</li> <li>○ Develop plans to improve retail and food and drink product</li> <li>○ Signpost to training and development opportunities for front line staff to improve skills and service.</li> </ul>	✓	✓	✓		

Objectives	2019	2020	2021	2022	2023
<b>Place</b> - There is work to do to improve Coventry as a place to visit which means that visitors are welcomed and can easily orientate themselves.					
Build on Great Places programme to develop:					
• Trails and routes to tie key product.	✓	✓	✓		
• Wayfinding and signage project.					
• Mapping and itinerary development.					
• Welcome training.					
Make cleaning Coventry a priority	✓	✓	✓	✓	✓
Develop Visitor Information and execution strategies that put the visitor at the heart of the offer and puts appropriate info in high visitor footfall areas.	✓	✓	✓		
Develop digital skills and capacity of tourism businesses and partners.	✓	✓	✓		
Development of comprehensive centralised listings database.	✓	✓			
Prioritise Gateway improvements - railway station.	✓	✓	✓		
Identify visitor hotspots and city gateways - ensure street cleaning and public realm strategies and delivery tie in with these.	✓	✓	✓	✓	✓

Objectives	2019	2020	2021	2022	2023
<b>Positioning</b> - Coventry needs to define and explain its offer based on the product and markets reflected in the DMP.					
Develop bank of key messages and photography to use when positioning Coventry to visitors.	✓	✓			
Complete Creative Tourist Digital recommendations	✓				
Apply centralise listing database to partner websites, digital itineraries and other key information channels.		✓	✓	✓	✓
Develop ambassadorial culture amongst residents, students and businesses to ensure they are Coventry's biggest and loudest supporters.	✓	✓	✓	✓	✓
Ensure partners' marketing and PR campaigns position Coventry as a visitor destination.	✓	✓	✓	✓	✓
Develop potential day and overnight visitor campaigns with key partners.		✓	✓	✓	✓
Ensure key theme and messaging are focussed to grow Coventry's share of the business and events market.	✓	✓	✓	✓	✓

Coventry Tourism Strategy  
Comparator Analysis  
Report 1

## **Introduction**

This document provides a desk-based review with the identification and review of good practice, data, and the Destination Management Plans (DMPs) of selected comparator cities to Coventry. This process has not only been undertaken with those identified as current comparators but also with those who Coventry could learn from. This review not only includes the various cities targets for growth but also the delivery models being used to achieve this. This will allow the Tourism Strategy / DMP steering group insight into these different approaches and take away key learning points. The destinations we have drawn comparisons against are Leicester, Sheffield, Bradford and Hull.

## **Leicester**

Leicester was earmarked by almost 1 in 5 consultees as a comparator city. With its heritage, proximity to Coventry, cultural offer, diverse resident population, and recent tourism developments, it is a city which Coventry compares to but could also potentially learn from.

### **Delivery Model**

Tourism Advisory Panel - key tourism sector partners

Tourism Delivery Plan with partners

Place Marketing Action Plan<sup>1</sup>

### **Key Products**

- National Space Centre
- King Richard III visitor centre
- 2000 year Story of Leicester
- Curve
- New Walk Museum
- Attenborough Arts Centre
- Abbey Park
- Phoenix - cinema and art bar
- O2 Academy
- Largest Diwali celebrations in western world
- Caribbean Carnival
- Britain's longest running comedy festival
- Jewry Wall
- Golden Mile
- High Cross Shopping Centre<sup>2</sup>

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<sup>1</sup> <https://www.leicester.gov.uk/media/180622/leicester-tourism-plan-reduced-size.pdf>

<sup>2</sup> <https://www.leicester.gov.uk/media/180622/leicester-tourism-plan-reduced-size.pdf>

## Development Priorities

- Tourism business and employment opportunities
- Maximise King Richard III tourism opportunities
- Work with wide range of partners
- Improve quality and accessibility of visitor destination experience
- Encourage repeat visits via multi-venue experiences
- Support partners in appealing to new markets
- Place the visitor at heart of tourism planning
- Grow business tourism market
- Perceptions research
- Leicester Food Plan<sup>3</sup>

## *Growth targets*

- £590million tourism value by 2020
- 5.2million overnight stays by 2020
- 8,000 jobs by 2020
- 13.6million visitors by 2020<sup>4</sup>

## Key Statistics

- 35.5million day visits (2013 Leicester & Leicestershire)
- Day visitor spend = £278million
- 4.4million overnight visitors – including SFR (2013)
- Overnight visitor spend = £234million
- More than 730,000 overnight stays were spent in commercial serviced and non-serviced tourist accommodation.
- Over 3.6 million nights were spent staying with friends and relatives in the city.
- Business tourism accounts for the most overnight stays in serviced accommodation in the city.
- Leicester enjoys a higher than average impact from overnight stays generated by people staying with friends and relatives (SFR).
- Leicester offers 31 establishments providing serviced accommodation, a total of 3,181 bed spaces. The city also offers 253 bed spaces in 102 self-catering properties and over 2,000 academic bed spaces that are available at certain times at the city's two universities.
- The average total economic impact per night for visitors staying in hotels and guest houses in Leicester was £115.
- While the number of overnight stays in serviced accommodation (hotels, and so on) remain broadly constant throughout the year, the number of people staying in non-serviced accommodation (self-catering) is markedly seasonal, rising from a low in January to a peak in August.
- 7000 jobs (2013)
- Value of tourism: £512million (2013)<sup>5</sup>

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<sup>3</sup> <https://www.leicester.gov.uk/media/180622/leicester-tourism-plan-reduced-size.pdf>

<sup>4</sup> <https://www.leicester.gov.uk/media/180622/leicester-tourism-plan-reduced-size.pdf>

<sup>5</sup> <https://www.leicester.gov.uk/media/180622/leicester-tourism-plan-reduced-size.pdf>

### Is it a Competitor?

Given its heritage, growing tourism offer, and being in the East Midlands, Leicester should be viewed as a key competitor to Coventry. With similar product and themes, particularly 'medieval history', and 'sport, dance & wellbeing', as well as similar development priorities such as working with a wide range of partners, developing a distinctive identity, encouraging repeat visits, and improving the quality of the visitor destination experience, there are a lot of competitive areas between the two cities. Leicester is slightly ahead in its tourism development journey which explains the significant difference in day and overnight visits, and expenditure. However, despite this the value of tourism and number of jobs suggest Coventry is well placed to match Leicester over the next few years in the tourism sector.

## **Sheffield**

Given its industrial heritage, diverse population, proximity to countryside and recent digital developments, Sheffield shares similarities and challenges with Coventry. It was also highlighted as a comparator city by 1 in 10 consultees.

### Delivery Model

Marketing Sheffield

DMP aligned to local and national strategies

Consideration to Tourism Business Improvement Districts (TBIDs)

### Key Products

- Purple Flag award for night time economy
- Crucible Theatre
- Lyceum Theatre
- Crucible Studio
- Graves and Millennium Galleries run by Museums Sheffield
- Site Gallery
- Kelham Island Museum
- Abbeydale Industrial Hamlet
- Beauchief Abbey
- Bishops House
- Sheffield Cathedral
- National Emergency Services Museum
- Weston Park Museum
- Magna Science Adventure Centre
- Sheffield Manor Lodge
- Ponds Forge
- Ice Sheffield
- FlyDSA Arena
- Sheffield City Hall
- O2 Academy
- Meadowhall
- Fargate
- Antiques Quarter

- The Moor Market
- EIS
- Sheffield Wednesday and Sheffield United<sup>6</sup>

### Development Priorities

- City Centre Masterplan – reducing the size of the retail offer in the City Centre by a third and connecting the different areas within our City Centre
- New Retail Quarter, Sevenstone
- Moor development and the Market
- Cultural Industries Quarter
- Chapel Walk – High St Innovation Fund
- Pop-up shops
- Engaging new, creative talent
- Festivals that support the brand values and alignment of University funding of festivals (Sheffield Food Festival etc)
- Business and leisure tourism
- An improved reputation for the city
- Opportunities for talent and creativity development
- Cultural, sporting excellence offering
- A vibrant retail offer
- Development of 4/5 star and 'boutique' mid-range hotel offer
- Development of a higher-end food & beverage offer
- Electrification of the Midland mainline and High Speed Rail 2<sup>7</sup>

### Key Statistics

- 1,293million overnight visitors
- £114 million overnight spend
- Lowest ranked core city for overnight visitors in the UK
- Ranked 20th in the CACI Retail Footprint
- Hotel room occupancy rates of 67%; average room rates - £48.
- Customer Satisfaction levels for City Centre Management (82%), cleanliness (96%), management (96%) and general enjoyment (98%).
- University ranked 3<sup>rd</sup> in 2011 for student experience
- The Millennium Gallery is the most visited free attraction in the North of England<sup>8</sup>

### Is it a Competitor?

Despite similar challenges around improving the retail and food offer, as well as quality of accommodation, it is worth noting that Coventry already has more overnight visitors and a higher occupancy rate than Sheffield. The similar theme of architecture and iconic buildings, alongside a comparable product offer, suggests Sheffield could be a competitor but three major events from 2019-2022 position Coventry excellently to provide a more compelling destination offer than Sheffield.

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<sup>6</sup> <http://www.welcometosheffield.co.uk/>

[https://www.tripadvisor.co.uk/Tourism-g186364-Sheffield\\_South\\_Yorkshire\\_England-Vacations.html](https://www.tripadvisor.co.uk/Tourism-g186364-Sheffield_South_Yorkshire_England-Vacations.html)

<sup>7</sup> [http://www.welcometosheffield.co.uk/content/images/fromassets/100\\_1934\\_170113174400.pdf](http://www.welcometosheffield.co.uk/content/images/fromassets/100_1934_170113174400.pdf)

<sup>8</sup> [http://www.welcometosheffield.co.uk/content/images/fromassets/100\\_1934\\_170113174400.pdf](http://www.welcometosheffield.co.uk/content/images/fromassets/100_1934_170113174400.pdf)

## **Bradford**

Bradford has been earmarked as a comparator city to Coventry due to its similar size, varied offer, and comparative challenges such as identifying internal partnerships and a visitor information service that is in transition. Many of its development priorities align closely to the potential areas of development that Coventry may focus on.

### **Delivery Model**

- VisitBradford (Section within BMDC) delivers website and marketing activity. Lead organisation for the implementation of the DMP
- Four Visitor Information Centres operated by City of Bradford Metropolitan District Council.
- TEAM Tourism Consulting (Commissioned by BDMC to develop DMP and review BDMC's Tourism Service)

### **Key Products**

- Ilkley (Attractive Victorian spa town) and Ilkley Moor
- Haworth and Bronte Country
- National Science and Media Museum
- Bronte Parsonage Museum
- Saltaire (UNESCO WHS) and Salt's Mill (Museum)
- Keighley and Worth Valley Railway
- Bradford Industrial Museum
- Cartwright Hall
- Impressions Gallery
- Alhambra Theatre
- Bradford Cathedral
- East Riddlesden Hall
- Cliffe Castle Museum and Gardens
- King's Hall and Winter Gardens
- Bolling Hall
- Peace Museum<sup>9</sup>

### **Development Priorities**

- Development of a second major city centre arts or cultural facility to complement the National Media Museum.
- Development of the evening economy - particularly in terms of restaurants and bars.
- Further development and upgrading of the retail offer.
- Animation and management of the city centre particularly in the evening.
- Re-development of the Bradford Interchange area which is a poor gateway.
- Outside of the city centre (primarily within Saltaire, Haworth, and Ilkley) priorities are primarily around improving visitor management (Toilet provision, car and coach parking, signing and interpretation).<sup>10</sup>

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<sup>9</sup> [https://www.tripadvisor.co.uk/Tourism-g186408-Bradford\\_West\\_Yorkshire\\_England-Vacations.html](https://www.tripadvisor.co.uk/Tourism-g186408-Bradford_West_Yorkshire_England-Vacations.html)

<sup>10</sup> <https://bradford.moderngov.co.uk/documents/s13571/Bradford%20District%20-Destination%20Management%20Plan%20Final%20-%20December%202016.pdf>

### *Growth targets*

- Increase value of tourism from £612m to £725m (by 2021)
- Support an estimated additional 1,650 jobs (by 2021).

### Key Statistics

- 8.6million day visits
- 91% domestic, 9% overseas visitors
- 626,000 overnight visitors
- 2.4million nights per annum
- 70% occupancy rate
- 2,130 bed spaces
- 9,600 FTE jobs (2015)
- Value of tourism: £612million (2015)<sup>11</sup>

### Is it a Competitor?

Bradford has a similar tourism offer and product as Coventry, and shares similar numbers of day and overnight visitors, jobs, and value of tourism. With a strong focus on research, it is a young, diverse city who is at a similar point in its tourism development, with shared priorities such as development of an evening economy, upgrading the retail offer and animation of the city centre. Despite Coventry having a stronger provision for business tourism, and different geographical markets, overall Bradford can be viewed as a competitor to Coventry, certainly up until 2021.

## Hull

As City of Culture 2017, Hull is perhaps an obvious starting point for comparator cities and will provide benchmarking for a number of targets for Coventry's City of Culture 2021. However, beyond this it shares a number of similarities with Coventry in that it has a good connection to the surrounding countryside, and a rich heritage, alongside a strong cultural offering. Furthermore, it was viewed as a comparator city by almost a third of consultees.

### Delivery Model

Visit Hull and East Yorkshire (VHEY) is the DMO. Created in 2007 to deliver the sub-regional outputs of the Yorkshire Forward Strategic Framework for the visitor economy. VHEY is a partnership between East Riding of Yorkshire Council, Hull City Council and local private sector visitor economy businesses.

### Key Products

- UK City of Culture 2017
- Humber Bridge
- The Deep
- The Artic Corsair
- The Spurn Lightship
- KCOM Stadium
- KCOM Craven Park

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<sup>11</sup> <https://bradford.moderngov.co.uk/documents/s13571/Bradford%20District%20-%20Destination%20Management%20Plan%20Final%20-%20December%202016.pdf>

- Hull Trinity Church
- Beverley Minster
- Fort Paull
- Skidby Windmill
- Burton Constable Hall
- RSPB Bempton Cliffs
- Rockcity

### Development Priorities

*3 Year Action Plan based around six themes:*

- Understanding the visitor journey
- Respond to trends
- Communicate with industry partners
- Developing experience and packages
- Deliver with destination partners
- Engage with visitors

*Key areas of Strategic development:*

- Partnership - be a beacon for the visitor economy
- People - raise the quality of the visitor offer
- Product - create experiences and support business
- Promotion - promote positive image of the area

*Growth targets*

- To generate an additional 2 Million visitors into Hull and East Yorkshire by 2017-18
- To increase the visitor economy by £200m by 2017-18
- To increase employment in the visitor economy by 3,500 jobs - taking employment within the visitor economy up to 20,000 by 2017-18

### Key Statistics

- 13.72m day visitors (2013) - made up of 4.4m from Hull and 9.32m from East Yorkshire
- 1,157,000 overnight visitors (2013) - made up of 352,000 from Hull and 805,000 from East Yorkshire
- 3,962,000 nights (2013) - made up of 1,287,000 from Hull and 2,675,000 from East Yorkshire
- 16,581 actual jobs across Hull and East Yorkshire in 2013
- Estimated 1,800 private and public-sector businesses benefited from the local visitor economy
- Value of tourism: £757m per annum (Hull and East Yorkshire) (2013) - made up of £260m from Hull and £498m from East Yorkshire
- Overnight visitor spend = £192m (£56m Hull and £136m East Yorkshire)
- Day Visitor spend = £369m (£139m Hull, £230m East Yorkshire)
- Business Turnover = £332m (£201 Hull, £131m East Yorkshire)<sup>12</sup>

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<sup>12</sup> <http://mediafiles.thedms.co.uk/Publication/YS-EY/cms/pdf/VHEY%20Tourism%20Strategy.pdf>

### Is it a Competitor?

There are numerous shared targets and objectives between Coventry and Hull. For example, strategic partnership is key to both when looking to improve their respective visitor economies. The visitor welcome and experience is also a development priority, as is promoting a positive image of the area. Furthermore, there are also some shared themes and products such as ‘sport, dance & wellbeing’ and a full ‘festival & events calendar’. However, Hull does not occupy the same ‘tourism space’ as Coventry, with a target audience more towards the North and West, as opposed to the Midlands and South for Coventry. Moreover, Hull is, at the moment, slightly ahead of Coventry in terms of the economic impact of tourism, with almost double the number of day and overnight visitors, and 6,000 more jobs in the sector. Though this gives us confidence in the catalytic impact impacts of being City of Culture 2021.

As the UK City of Culture 2017, Hull will undoubtedly provide a benchmark for Coventry towards, throughout, and beyond 2021. The University of Hull have produced a preliminary evaluation report which has revealed some useful visitor economy statistics for Coventry to consider.

- 51% of visitors were from Hull, with a further 27.5% of audiences were from East Yorkshire.
- There was an increase in the proportion of audiences from elsewhere in the UK, in comparison to 2016 events, with over 1 in 5 audience members (20.7%) visiting from elsewhere in the UK.
- Less than 1% of visitors were from overseas, which was a very small proportion of the overall volume of audience attendances. This 0.98% equates to 52,000 attendees. In the context of over 437,000 international trips to Hull in 2016, this percentage is relatively small. This would suggest that the programme had little impact in attracting additional visitors from overseas.
- However, hotel occupancy grew by 10.5% from 2016 and the value of tourism for 2017 saw a £40m increase compared to aforementioned 2013 statistic.
- The age profile of audiences shows high representation of people aged 55-64, and an under-representation of audiences aged 16-34 years old.<sup>13</sup>

Furthermore, at the time of writing there is consideration that the Hull 2017 Culture Company will continue as a permanent national arts company based in the city, developing a 20-year legacy plan across three phases, as set out in Hull City Council’s Cultural Strategy, supporting the delivery of the city’s £250 million legacy plan to improve Hull’s culture and visitor infrastructure. Whether the Culture Company’s role develops into becoming the destination management delivery organisation for the city remains to be seen.<sup>14</sup>

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<sup>13</sup> <http://www.hull.ac.uk/work-with-us/more/media-centre/news/2018/city-of-culture-evaluation.aspx>

<sup>14</sup> <https://www.hull2017.co.uk/discover/article/company-behind-hull-2017-continue-national-arts-organisation/>

## **Key learnings**

- Hull 2017 has been received as a very successful delivery of a City of Culture programme so provides an excellent opportunity for Coventry to learn from and improve upon in 2021.
- Given the similarities between Coventry and Leicester, Leicester's delivery model is an option which should be considered.
- These 'second tier' destinations, particularly Hull and Leicester, face similar challenges and journeys to Coventry and should provide inspiration and learning opportunities.
- Partnership is key to delivery and success across all of these comparator cities
- The visitor experience is a core objective for all of these cities
- Promoting a positive image and developing a distinct identity is a challenge for these comparator cities.
- Retail, food & beverage, and quality accommodation are key development priorities.
- There are similar themes and products across these comparator cities so selection of distinct themes and itineraries for Coventry is fundamental for differentiation.

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## **Destination Management Plan**

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**Coventry Tourism Strategy  
Product and Audience Review  
Report 2**

## **Identifying Coventry's Offer**

The Tourism Destination Management Plan (DMP) presents a roadmap to develop Coventry as a visitor destination by 2023. The development of the product available to visitors is key to this. This document provides further insight into the product areas and potential audiences Coventry should be looking to attract.

The products have been grouped into themes highlighted in Appendix 1. These have been tested against the findings of both the consumer and business research carried out as part of the development of the Strategy / DMP to assess where there is a fit and which should be prioritised. This has been aligned with known investment and development in the product offer of Coventry over the next few years.

The products and themes have been aligned to the years it is proposed they will come to fruition over the period of the Strategy / DMP. This will be a cumulative process which will build the product offer and audiences for Coventry. The work below identifies the themes and the year it is proposed they will ready to take to market, though some flexibility in order to accelerate or further develop product is assumed.

Appendix 1 of this report is a table that lists the main products within each theme for convenience.

## **2019**

### **Iconic Buildings and Architecture**

This product exists as part of the fabric of the city and is widespread. Iconic product such as the Cathedral is recognised by both visitors and non-visitors alike and there is significant potential to utilise these buildings to act as the key attractor to the city.

30% of visitors to Coventry currently cite their main reason for visiting as sightseeing while 65% base their day out on previous experience. Using the buildings and architecture of the city to develop trails and tours would be a 'quick win' to move people around the city and use its buildings as part of its wayfinding strategy.

This would also allow for greater engagement with product in the city and the availability of itineraries would encourage them to visit new areas and attractions.

Key product for this theme should include:

- Coventry Cathedral
- St Mary's Guildhall
- Old Cathedral
- Holy Trinity
- Spon Street
- Weaver's House
- Priory Visitor Centre and the Undercroft
- Charterhouse and Gardens
- Coventry Market

- Drapers' Hall
- London Road Cemetery

There are also many potential delivery partners for this theme including:

- Historic Coventry Trust
- Coventry City Council
- City of Culture Trust
- Culture Coventry
- Coventry BID
- Blue Badge Guides – to showcase the offer through walking tours

The main development needed to maximise this theme is the production of trails both on, and offline, and improved wayfinding around the city. The development of itineraries that identify what can be visited in half a day, a full day or a weekend will allow the opportunity to showcase the city.

The city's current visitor profile is young, with more than half of visitors under 35. Improved packaging of this product in this theme will attract an older demographic and thus expand Coventry's appeal.

Although 'Iconic Buildings and Architecture' has an existing audience there is significant room for development. Resource is mainly required around packaging rather than investment in product.

Both this theme and the medieval history strand below present significant opportunities to work with Blue Badge Guides in the city to curate trails and to bring the stories of the city to life.

## **Medieval History and Stories**

There is a definite sense amongst the culture and heritage community that the Medieval History of the city is an underplayed asset. There is a passion to demonstrate that Coventry's history is about much more than just WW2 and runs from medieval to modern times.

On the consumer side, visitors said that one of the most popular elements of their visit was the history of Coventry, and 1 in 5 strongly agreed that there is a lot of heritage attractions in the city.

As with the 'Iconic Buildings and Architecture' theme, much of the work required to develop this area is in the packaging and wayfinding strategies that are developed for the city, including the development of Coventry's digital presence. There is significant overlap between these two areas.

There is a great deal of product that could be brought to life within this area including:

- Lady Godiva
- Priory Undercroft
- St Mary's Guildhall and the Coventry Tapestry (the only tapestry of this age in the UK to hang on the wall for which it was made)
- Old Cathedral

- New Cathedral
- Medieval to Modernist offer
- Holy Trinity
- Spon Street
- Weaver's House
- Charterhouse and Gardens
- Coventry Market

However, 'Medieval History' is an area in which there is a great deal of competition, with cities such as York, Bradford and Leicester using their history and heritage as a key strand of their promotion. Leicester is seeking to maximise its medieval history offer with the opening of the King Richard III Visitor Centre which will generate significant interest. Therefore, it is vital that the product of Coventry is well packaged and the unique key products are identified.

The post war architecture is also of potential interest to niche markets and to Coventry residents. Coventry City of Culture Trust is currently carrying out additional research into this theme as part of the Great Place project with the aim to provide maps and trails promoting Coventry's medieval treasures before the end of 2018.

## **Conferencing in Coventry**

The City Council's current conferencing focus is on business visits and events, attending trade shows such as Confex, showcasing the business tourism offer of the city. There are a number of key and well-known venues within the city portfolio including the Ricoh Arena and Warwick Conferences. Indeed, in 2017, the Ricoh Arena hosted 538 conferences and 58 exhibitions among the overall 777 events they held in the year, attracting 1.4 million business visitors in total.

While this is an area in which work has taken place over recent years the development of the Tourism Strategy / Destination Management Plan gives a good opportunity to pause and undertake a Business Tourism Review to ensure the city is delivering this theme consistently and cost effectively.

This review is necessary for a number of reasons:

- Not all stakeholders promoting conferencing in Coventry are promoting the city as part of their offer.
- Midweek occupancy in the city is already high so capacity could be a potential barrier in growing this market. Therefore, it is critical to think strategically about how sustainable growth in the area is delivered and concentrate resource where intervention will have the most impact.
- 2021 provides an opportunity to generate conference business aligned to City of Culture. Targeting the right conferences needs to happen as priority and should form part of this review.
- It will allow greater clarity on the level of resource required to make an impact in such a competitive market, and can focus limited resource to the main areas of priority.
- It would allow a review of the needs of event organisers and delegates.

The development of the Strategy has identified a number of opportunities that would increase Coventry's business visits and events that need testing as part of the review. These include:

- Working with academic institutions to identify conferences being attended by University staff that could be brought to the city, as well as aligning the strategy with the strengths of the city.
- Build on the innovation and automotive strengths and target conferences and events in these sectors.
- Generating conference business for the city by targeting sports and cultural conferences in line with major events that will be coming to the city over the next few years.
- Collaboration with West Midlands Growth Company and Shakespeare's England especially in years one and two to ensure traction and visibility on a national and international scale.
- The proximity to London and an international airport is an advantage for this area. For event organisers and delegates transport and ease of access are key drivers.
- The additional benefit of City of Culture will mean that Coventry is on more business radars than previously and the city should ensure that it is in a position to take advantage of this.

The review should be led by the Destination Partnership (see Report 3) and undertaken by an independent consultant to re-evaluate the strategy for business visits and events, including messaging, attendance at future events, and identifying the best organisation to lead. This would also include the requirements for the city at product level such as the development of additional hotel stock and potential need for a city centre-based conference venue.

## **Family Fun**

Visitor research and industry interviews have shown that currently the city has a young visitor profile and a product naturally suited to an older demographic. However planned investment in product in the city will bridge this gap. The most significant example of this is the Water Park.

Other product to be included in this theme includes:

- Coventry Transport Museum
- Herbert Art Gallery and Museum
- Lunt Roman Fort
- Planet Ice
- Ricoh Arena

Whilst the opening of the Water Park will attract new visitors to the city, additional product development is required to ensure that these visitors stay longer and spend more.

Work with existing product to ensure their offer appeals to a family audience is also important. Free entrance to a number of Coventry's key attractions adds to the appeal. Generating

awareness of additional products such as Escape Rooms and other facilities will also increase the scope of the visitor offer.

Improvements to pre and post arrival information will also play a key role in developing the offer to the family audience including the development of itineraries for the family audience and highlighting family friendly activities and events via new digital content. City of Culture 2021 will also provide a key opportunity to showcase the city to the family audience.

## **Sport and Wellbeing**

By 2020 sport and wellbeing will be a key component of Coventry's visitor offer. Currently only 5% of visitors said their main reason for visiting was to watch sport. However, 61% of visitors are aware of the Ricoh Arena.

This theme will be enhanced by key events Coventry has attracted including:

- Coventry being European City of Sport in 2019
- Birmingham hosting the Commonwealth games in 2022 (Coventry will host Netball as part of this)

These developments will create a strong narrative around sport and culture which should encourage greater collaboration between these two sectors when engaging local and national audiences.

As previously mentioned, there is also significant investment being made into the leisure product of Coventry with the new £37 million Water Park spearheading this and a new 50 metre pool, both due for completion in 2019.

Other key product within this area would be:

- Professional Sport – International, Premiership and Championship Rugby; League One Football; International and Elite League Ice Hockey; Superleague Netball.
- Dance & Joining in –Mercurial Dance, Highly Sprung.
- Coventry University/PYF dance events with young people.
- New Cycle paths – Canal Basin, Daimler Building, Charterhouse Park etc.

Sport engages a wide range of audiences, including those seeking family fun, who will be encouraged into town through the Water Park or cycle trails, through to international enthusiasts willing to travel to watch football, rugby or motorsport in the UK.

This area can also be integrated into the Coventry Health and Wellbeing Strategy which aims to improve the health and wellbeing of the residents of the city.

## **2020**

### **Home of the Bicycle, Car and Taxi**

After the Cathedral, The Transport Museum is the next most well-recognised and visited attraction in Coventry, and 1 in 4 visitors said they were aware of it.

The stakeholder consultations also highlighted Jaguar Land Rover and innovation in engineering and building as key USP's for the city. The growth of Coventry MotoFest with an estimated 130,000 visitors annually provides a focus to build interest in the city's historic and current transport innovation, design and manufacture.

Aside from the product mentioned above, this theme requires significant product development including:

- Showcasing the city's relationship with the development of the bicycle.
- The development of a bike hire scheme.
- The proposed Charterhouse to Gosford Green cycle loop and canal tow path offer new products to residents and visitors.
- The 2 Tone Taxi Ride that was used as part of the City of Culture bid could also play a pivotal role in showcasing Coventry's importance as the home of the Taxi. The original taxi used in the bid has now been replaced by an electric version. The artwork has remained the same and the vehicle will remain a symbol of both Coventry's heritage and continuing contribution to transport.

Coventry could showcase its history as the home of these developments particularly around the bicycle. This could be developed in collaboration with the sport theme and development of the cycling trails for the city.

## **2021**

### **UK City of Culture**

Obviously City of Culture will have a catalytic impact on Coventry as a visitor destination.

City of Culture will shine a spotlight on Coventry for 12 months and in the run up attracting local, national and international visitors. The challenge will be to maximise this opportunity and ensure that it creates a lasting legacy for the city and permanently increases and shifts visitor profile. The city should be left with a positive reputation for cultural events and grow visitor numbers by more than 1 million.

To highlight the impact of being City of Culture, Hull's UK City of Culture year attracted a total audience of 5.3 million visitors who attended more than 2800 events, activities and exhibitions. These visitors contributed £300m to the local economy.

The event also generated 20,200 pieces of media exposure while locally 3 in 4 said the event made them proud to live in Hull and it is estimated that 95% of residents visited at least one event.

## **2022**

### **Music**

Music is a theme identified with an existing product but a potential to grow new audiences.

There is a wide range of product in the city. The annual Coventry Godiva Festival attracts an audience of up to 179,000 with increasing audiences and profile outside the city.

The Ricoh Arena has also hosted a wide range of high profile music events such as the Rolling Stones, Bruce Springsteen, Take That, MTV Crashes and Rihanna, and will continue to do so in the future. In May 2018 Coventry hosted BBC Music's The Biggest Weekend at the War Memorial Park, bringing a national profile and a significant out of city audience.

The city also has a thriving independent offer which includes Tin Music and Arts, Coventry Music Museum, Albany Theatre and the Empire. This will support and enhance the mainstream offer to make sure the music scene in Coventry appeals to a diverse audience. Being the birthplace of 2-Tone Ska supports this independent offer and is of definite interest to visitors as demonstrated by the interest it generated in the City of Culture bid.

The music offer of the city will be further enhanced by a £5 million investment to turn Drapers' Hall into a music venue for performances and as a training space for future musicians, with a proposed opening in 2020.

## 2023

### Food and Drink

The DMP consultation demonstrated that neither visitors or stakeholders identified Coventry's food and drink offer as a key draw to the city. Only 1 in 10 said that food and drink were their main reasons for visiting.

However, the product audit undertaken as part of the work demonstrated both the volume and diversity of the offer. Areas such as Bradford, named the 'Curry Capital' have identified their food offer as a strength and maximised its development, which is an area Coventry can learn from. Leicester have also developed a Food Plan for the city to strengthen its strategic importance in its tourism offer.

There are some key product strengths such as:

- Coventry Market
- Cathedral Lane's restaurants
- Fargo Village Artisan products
- Multicultural Food Festival
- Developing food offering and areas such as Foleshill Road, Spon Street and the Butts

There is a strong opportunity to grow this area by showcasing the product and attracting local residents. Coventry has a diverse community and therefore a diverse palette which should translate into a major reason to visit if developed appropriately.

### Independent Shopping

Successful city visitor destinations nearly always have a recognised retail offer which is not something that Coventry currently can boast.

International students can be seen on a regular basis arriving at Coventry train station carrying armfuls of shopping from day trips to Birmingham. This is lost revenue to the city.

With the BID in its second term there is the opportunity to work with the retail offer to enhance the experience and to create a strategy that develops a mix of key anchor retailers alongside a thriving independent community.

The retail offer could also benefit from building on the diverse nature of the city and ensure it has a broad appeal.

## **Identifying Coventry's Audiences**

The ambition of the Strategy / Destination Management Plan is that Coventry will be attracting and retaining 2.3 million additional visitors by 2023. These visitors will change over the lifespan of the DMP and the ambition by 2023 would be that Coventry is recognised as a UK short break destination.

Key infrastructure developments and a strengthened product offer and event programme will see a diverse visitor audience travelling to Coventry for day and overnight trips.

At the beginning of the DMP journey it is helpful to categorise Coventry's potential and existing visitors into three groups.

- Day Visitors
- Overnight visitors
- Business visitors

Key audiences for the city are outlined in more detail below.

### **Day Visitors**

According to the Cambridge model undertaken for Coventry in 2015, 92% of all visits to the city were made by day visitors. The visitor survey undertaken by NGI Solutions in 2016/17 indicated the average spend by these visitors was low at £27.77. Considering these visitors stay in the city for 5 hours, this is an hourly spend of just over £5.

However, due to the volume of these visitors, they are a significant market for the visitor economy and they should be treated as a priority, especially in the first 12 months of the Destination Management Plan.

Currently these visitors can be described as being local, either residents of the city or from within a one-hour drive-time. However, the connectivity of London by train in just over an hour could also attract London-based visitors for day trips.

The planned redevelopment of Coventry train station will provide a key impetus for the development of the day visitor market with an increase in the number of trains from Birmingham from 7 to 9 per hour and a new service to be implemented between Coventry and Nuneaton.

The challenge for this market is to increase engagement with the city and to encourage a greater number of day visits and spend. Another key challenge for the development of the day visitor market in Coventry is to break current habits. Research suggests that local residents are only coming in to the city for general sightseeing or to visit the Cathedral or Transport Museum (free), both of which are key attractors. This pattern is not generating opportunities for growth. Local audiences need to be encouraged to visit a wider range of attractions and understand more of what the city has to offer through the use of itineraries, maps and trails.

Investment in the new Water Park will bring a different visitor demographic and should encourage more people into the city, but improvements to the wayfinding of the city are needed. The work being carried out by Creative Tourist and work to implement a curated ‘What’s on Guide’ for the city are vital tools to get local residents and day visitors to experience and spend more.

There is potential for a ‘Coventry Card’ to be an incentive for Coventry’s local population to explore more of the city. This could create additional benefits to encourage residents to bring friends and relatives to Coventry. It would also provide a mechanism to track visitor movements and encourage people to try out less popular attractions as well as the attractor product.

The day visitor/local resident market could also be developed by the implementation of a Residents Festival. These have been popular in a number of areas such as Cheshire and York and have seen significant results for the host destinations.

## **Overnight Visitors**

The city must aim to increase its overnight leisure visits. Given the high occupancy in peak periods this may depend on increased and improved accommodation stock. New brands will also play a role in marketing the city through their own promotion.

There is a healthy group travel use of the city’s hotels though anecdotal evidence suggests that they don’t spend money outside the confines of the hotels. Encouraging these visitors to visit the wider city must be a priority. City of Culture 2021 will be a catalyst to further develop the group travel market requiring targeted work with hotels, operators and travel markets. A highlighted issue has been the lack of city centre coach parking.

Many existing groups use Coventry as a stopping point and work could be done with attractions such as Warwick Castle, the RSC and Compton Verney for joint planning in order to make the city part of this offer.

The most obvious opportunity to deliver a greater volume of overnight visitors is to develop Coventry’s SFR market (staying with friends and relatives.) This market is already substantial, with 1 in 4 overnight visitors staying with friends and relatives.

While the city should anticipate a surge in visits during the year of City of Culture, the city should be ensuring that this is already starting to happen prior to 2021. If every resident in Coventry encouraged one friend or family member to visit per year that would automatically

increase visitor numbers by 350,000 people. This is why encouraging local residents to visit the city is key to developing increased SFR numbers.

The SFR market becomes increasingly important when linked to Coventry's student population and high numbers of international students. Building on ideas to engage a day visitor market through work to encourage the local community to bring their friends and relatives to Coventry must be a priority. A specific campaign could be run with international students to encourage friends and family to visit the city, potentially in partnership with the universities, Birmingham Airport as well as London airports, given the travel time into Coventry.

### **Business Visitors**

Business visitors stay longer and spend more than leisure visitors and therefore should be a priority for any destination. Coventry's average day business expenditure is £55.05 and overnight expenditure is £202.61. Overnight expenditure by business visitors is more than £30 higher than that of an average overnight visitor to the city.

Furthermore, very positively 60% of visitors would recommend Coventry for business and 82% would return again for leisure. As 1 in 4 of Coventry's business visitors come from within the Midlands this also makes them an ideal audience to encourage to return as leisure day visitors and to bring family and friends with them.

Recommendations to develop Coventry's Business Visitor offer are explored on page 5 of this document.

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## Appendix 1

Themes	Products	Headline Product
Iconic buildings & Architecture	3 Cathedrals, Spon Street, St Mary's Guildhall, Old Cathedral, Holy Trinity, Modernist to Medieval, New Cathedral, Coventry Market	Coventry Cathedral
Medieval History & Stories	Lady Godiva, Priory Undercroft, St Mary's Guildhall, Old Cathedral, Holy Trinity, Spon Street, Weaver's House, Parish Church of St John the Baptist, Charterhouse & Gardens, link to Battle of Bosworth & Richard III etc.	Lady Godiva
Home of the Bicycle, Car & Taxi	Coventry Transport Museum, 2Tone Taxi ride, MotoFest, cycle routes	Coventry Transport Museum
Family Fun	Coventry Transport Museum, Herbert Gallery & Museum, Lunt Roman Fort, Nativity film location tour, Water Park, Escape Rooms	Coventry Water Park
Conferencing in Coventry	Warwick Conferences, Ramada, Coventry University, Ricoh	Warwick Conferences
Sport	Ricoh Arena. International & Premiership Rugby; League 1 Football; Superleague Netball; Championship Rugby; International and Elite Ice Hockey; New Water Park; New 50m Pool; Dance & joining in – Mercurial Dance, Coventry University/PYF dance events with young people, Yoga in Parks New Cycle paths – Canal Basin, Daimler Building, Charterhouse Park, European City of Sport	Ricoh Arena
Music	Coventry Music Museum, Ska Music, Delia Derbyshire, Coventry Godiva Festival, The Enemy, Ricoh, Warwick Arts Centre, Tin Arts, Draper's Hall new music venue, Empire, Musical Journeys	Godiva Festival
Coventry City of Culture 2021	Build up programme, piloting new performance ideas, Theatre & Outdoor Arts – WAC, Belgrade, Shop Front, Talking Birds, Festival of Imagineers, Highly Sprung	Year-long programme
Independent Shopping	Coventry Market, Fargo Village, Spon Street	Fargo Village
Food & Drink – a taste of every nation 'Dip into Coventry'	Coventry Market, Cathedral Lanes restaurants, Multicultural Food Festival, Artisan food & drink at Fargo Village	Coventry Market

## Coventry Tourism Strategy Delivery Structure and Resources – Report 3

Delivered to Coventry City Council and City of Culture Trust (DMP Steering Group) by NGI Solutions

## **Introduction**

Coventry's Tourism Strategy / DMP highlights the priorities and work areas to drive the visitor economy forward over the next five years. Clearly success will depend upon the structures, partnerships and resources allocated to this. This report proposes the most practical and realistic delivery structure for the DMP and is based on feedback from stakeholder consultation and further refinement with Coventry City Council and the City of Culture Trust. Recommendations around resourcing future projects are also included.

## **Delivery Structure Context**

Feedback during the consultation process has highlighted:

- There is a current lack of co-ordination between organisations who influence Coventry's visitor economy.
- There is no obvious lead organisation or contact who is seen to be driving the visitor economy.
- There are a number of special interest groups who act in isolation.
- There is a perceived and actual lack of resource and budget within the Council.
- There is scepticism about the Council's ability to quickly respond to opportunity and deliver.
- CVOne has had a negative impact on people's perceptions on what a delivery structure could look like.
- The city isn't yet effectively linking into the expertise that the West Midlands Growth Company can offer.

But:

- There is great energy and enthusiasm to develop Coventry's visitor economy and maximise the opportunity that Coventry 2021, and other major events, will bring to the city.
- There is a pool of talented individuals who are already in place that will support future developments.
- Coventry is surrounded by expertise and mature organisations who want to work with the city such as Shakespeare's England and West Midlands Growth Company. This interest is helpful and welcome but stakeholders are keen that Coventry retains its own identity and voice in wider regional and national partnerships.
- Coventry City Council already delivers a number of services that contribute towards Coventry's destination aspirations such as public realm improvements, signage and street cleaning, as well as the more obvious work around business tourism, event bidding and some business engagement.
- The City Council is set to reposition its destination and tourism offer, work and partnerships in line with an adopted Strategy/ DMP.
- Coventry City of Culture Trust is seen as a key organisation with momentum, resources and influence and much of the preparatory activity for Coventry 2021 will deliver against the Strategy / DMP priorities particularly around positioning.
- Inevitably, focus on 2021 is driving wider stakeholder's agendas as wider infrastructure developments and projects that support the delivery of the year-long event have a new energy and deadline.
- The Great Places and Cultural Destinations project led by the Coventry City of Culture Trust is already laying some great foundations for the DMP and demonstrating how a proactive partnership can work.

- The work of Creative Tourist based on the visitor profile research offers a clear road map to address the city's digital and web presence.

Therefore, when designing a structure to deliver Coventry's DMP over the next five years, the following principles should apply:

- The work and activity of existing organisations and groups that contribute towards the DMP need to be coordinated.
- Strong and politically astute leadership is imperative moving forward.
- The delivery of future activity needs to be nimble and agile in order to respond to opportunities and navigate bureaucracy.
- There is neither the desire nor resources to create a separate organisation to manage this.
- Partners need to be realistic about the resources available to support Coventry's visitor economy.
- Partners must have an appetite to work across boundaries, particularly at a regional and national level.
- There needs to be a step change in capacity and expertise to market the city both on and offline.
- Any future structure needs to consider the legacy of the organisations involved. There may be potential for the City of Culture Trust to take a greater lead in Destination Management post 2021 and build on the success of this and other events Coventry has, and will, attract.

## **Proposed Structure**

### ***Destination Partnership***

It's proposed that the key organisations that impact upon the destination management of Coventry come together as a Destination Partnership (DP). Partnership has been identified as a key priority of the Strategy / DMP and the first year of this is especially critical. Key requirements to make this successful include:

- The Destination Partnership will meet regularly.
- The organisations involved will come to the table prepared to share information and resources and potentially funding to deliver against the action plan. Enrolment to the Destination Partnership should be based on the contribution organisations are able to make to the partnership and the benefits the combined contributions deliver back to their organisations and the city.
- Partners should agree an appropriate Chair for the DP and this, for the first year at least, should be considered for a remunerated position in order to get real focus and drive behind the partnership.
- The DP and the projects it agrees need to be administratively supported by a new post.

The recent creation of Coventry's Cultural Place Partnership supports this course of action and it is anticipated that the DP could report into the wider Partnership enabling a route for the City Council, City of Culture Trust, two universities and Coventry Sports Network (amongst others) to receive updates and advice on the wider visitor economy.

Following DMP Consultation, the following organisations / sectors are suggested to make up the DP based on the resources, skills, expertise and energy they already put into Coventry's visitor economy.

- Coventry City Council<sup>\*15</sup>
- Coventry City of Culture Trust, including Great Places representation
- Coventry Business Improvement District
- Coventry University and the University of Warwick / Warwick Conferences
- West Midlands Growth Company
- Coventry and Warwickshire LEP
- Industry Representatives depending on gaps on skills and expertise (e.g. accommodation, hospitality sector, sport, heritage and visitor attractions). Some of these sectors will need support in order to come together to represent their interests and work. For example, an initial collective approach to the travel trade would be a useful way to coordinate visitor attractions, potentially led by Culture Coventry, which could then lead to greater collaboration and a single sector voice at the DP.

### ***Destination Partnership Manager***

Strategic administrative support is essential to ensure the DP runs smoothly and remains focused. To achieve this, a Destination Partnership Manager role hosted by the City Council for the reasons outlined above, is recommended. It would:

- Manage the DP and support the Chair in driving the partnership and its agendas.
- Commission and oversee work on behalf of the partnership.
- Service the partnership.
- Develop relationships with key strategic and delivery partners such as Visit England and West Midland's Growth Company.
- Develop a digital partnership as outlined in the Digital Audit to deliver the new digital strategy.
- Drive forward and keep track of action plans and activity.
- Ensure that partner organisations are delivering against set actions and considering visitor needs in their plans and projects.
- Explore funding opportunities and partnerships.
- Review and update the Strategy / DMP with the support and input of DP members.
- Be the “voice” of tourism within the local authority, raisings its profile and coordinating services when required.

As previously mentioned, it is essential that the significant City Council services that deliver areas identified in the Strategy / DMP are galvanised and coordinated while recognising that in many cases, it will be more effective to commission external delivery partners.

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<sup>15</sup> \*Coventry City Council is key to the DP's success. It already has posts and resources dedicated to the visitor economy but also delivers a range of often “hidden” services such as licensing, waste collection and bigger infrastructure projects like the Water Park that are crucial to the delivery of many DMP projects. The Council is currently looking to source additional resource for delivery including a new senior destination post (see point below) that will be crucial to the Destination Partnership and the DMP delivery moving forward.

In addition, the recent Digital Audit has suggested that a Digital Partnership Support Officer role is also introduced to the Coventry City of Culture Trust to support the outcomes of the Audit. This would build capacity in the city and address the weaknesses around the city's overall destination web and digital presence.

Both Coventry City Council and the City of Culture Trust have been identified as lead partners on the Destination Partnership because of the influence, resources and ongoing work programmes. They are also regarded as the biggest champions of the benefits of developing Coventry as a destination for visitors and understand potential impacts and improvements the delivery of the Strategy / DMP will bring.

As the host of the Destination Manager post and the resources currently available, it makes sense that the City Council becomes the commissioning organisation for any work actioned by the Destination Partnership.

Appendix 1 of this report outlines the proposed structure for the Destination Partnership and identifies the role individual organisations could play alongside the wider coordination that will be achieved.

## Resources

The most successful cities resource their destination management work via a broad range of funding including:

- Local Authorities
- national tourism funding via Visit England and Visit Britain ( often in kind)
- private sector partnerships and contributions
- partnerships with other Destination Management Organisations
- transport operators
- grants and trusts e.g. Arts Council England and Heritage Lottery Fund
- commercial services, such as shops linked to Visitor Information Centres, merchandise, commission generation or delivery of visitor economy services to others.

Additionally, resource comes from organisations whose prime focus may not be the visitor economy but whose activity indirectly contributes to the development and vibrancy of the overall destination. These include:

- Local Enterprise Partnerships
- Business Improvement Districts
- Universities
- The wider business sector who recognise the benefits of the place being developed and promoted positively

Budgets range from the hundreds of thousands to over £8 million per destination and there is no one model that is replicated across the country, both in terms of structure and resources.

For example, NewcastleGateshead Initiative has a four-pronged approach to its funding mix: local authority, contributions from partners in the destination, grant funding and a trading arm delivering a consultancy service. Destination Bristol have a wider portfolio running two Business Improvement Districts, a Cultural Destinations project, developing commercial revenue opportunities and a small amount of local authority funding. Marketing Manchester is part funded by Manchester Airport. Marketing Cheshire has focussed on leading and delivering several Discover England projects as well as providing marketing services to

Cheshire businesses. Funding models for destinations develop over time on a place specific basis.

In the case of Coventry, the city will need to invest in itself to lever additional resources. The positive example of Great Places and Cultural Destinations was made possible by City Council support with match funding of £50,000 for Great Places and £30,000 Cultural destinations. This in turn enabled Culture Coventry, the Coventry City of Culture Trust and partners to secure £2 million new investment in the city for product development, marketing and strategic work around culture, tourism and local engagement with heritage. The Great Places programme in particular offers a strong start to the Strategy / DMP for the next two years and there will be the opportunity to attract similar resources in the future, based on projects in the Strategy.

There are budgets over £500,000 in Great Places and Cultural Destinations for marketing, training, trails, mapping and cultural destination events such as the Cathedral Lighting Commission and Shop Front Festival. There is support for resident engagement in the heritage offer of the city. However, the Strategy proposes new pieces of work which will require new funding.

Going forward there are several routes for financing future activity:

**Local:**

- The City Council has had dwindling resources both in terms of its destination team and its budget. However, growth plans linked to 2021 will see (as previously mentioned) the reinstatement of key human capacity at a strategic level and the potential to present a business case for further visitor economy investment. Ideally the City Council as commissioning body would have a core cash budget of circa £100,000 to £150,000 minimum to provide leverage and delivery of its own programmes. This will be essential if Coventry is to engage with national programmes such as Discover England and to deliver essential work like an accommodation study.
- Coventry City of Culture Trust will have overall marketing and PR budgets – in part supported through the City Council. Subject to meeting fundraising targets the Trust plans to build marketing budgets of around £3 million for 2018 to 2021 – on a scale never seen in the city. Work to resolve twin websites for destination and cultural events will be a key contribution to resources going forward. The Digital capacity work by Creative Tourist has identified the need for around £110,000 investment in digital and web capacity work to be funded through a mixture of Great Places, City of Culture and other resources. This is an initial sum and clearly ongoing resourcing requirements will be a key focus for the destination partnership.
- The Cultural Destinations and Great Places programme has resources for marketing and product development in 2018 and 2019.
- The Coventry Business Improvement District has a budget of around £400,000 a year and could play a particular role in engaging city businesses and developing the independent shopping and food and drink offer.
- Whilst the visitor economy isn't core business for universities there are ways that they might engage through the Place Partnership. Warwick Conferencing also has promotional spend in the city and could input to a business conferencing and events

review. The universities have the largest budgets for marketing in the city although these are targeted and not directly aimed at visitors (although it is assumed the more students they attract, the more VFR visits the city will benefit from.)

#### **Regional:**

- Whilst the Coventry and Warwickshire LEP has culture and tourism as a priority, it has limited revenue budgets but might be capable of investing in key projects that support infrastructure, such as an accommodation study. It has funding for project proposals from cultural and tourism organisations to develop its funding pipeline.
- The West Midlands Growth Company has received support from West Midlands Combined Authority and Visit Britain and should be a partner for projects. It may be possible for Coventry to benefit from their national funding from Visit England's Discover England fund and to partner with future bids that give a strong Coventry voice in Midlands packaging.
- Birmingham Airport has supported the City of Culture Trust up to 2018 and could be a major partner in the Destination Management Plan. In kind support might also be sought from rail operators and airlines.

#### **National:**

- Coventry could apply for future rounds of Discover England funding particularly linked to City of Culture although one of this fund's main criteria is cross boundary working / partnerships and so wider thinking around potential projects that support Coventry's product should be a priority for the Destination Partnership.
- Visit Britain have recently submitted proposals for a Tourism Sector Deal to the government as part of the consultation on the Industrial Strategy. A strand of this is the creation of Tourism Action Zones that will "build quality tourism products that meet visitors' needs and expectations, extending the tourism season and fixing localised transport issues to improve the visitor experience". It is likely that DCMS (who awarded City of Culture 2021 to Coventry) will be developing this proposal and a case should be made to align Coventry as a Tourism Action Zone and City of Culture.
- Additionally, DCMS has invited Coventry to put forward proposals for accelerating capacity and city readiness. If resources follow, there is the potential to cover a significant proportion of the DMPs project activity in 2018/19.
- The Destination Partnership should also follow the work of the Cultural Cities Consortium who has recently launched an enquiry into the resources available to fund culture in cities. Whilst only at enquiry stage, this will hopefully produce some valuable learning and suggest innovative funding solutions for the future which could be used for the City of Culture legacy and DMP projects post 2022.
- With City of Culture there is a unique opportunity to bring national partners on board such as the BBC, Tate and others who bring their own marketing collateral to the city. Whilst this won't necessarily be cash budget, it is an important part of the mix. The BBC Biggest Weekend is an example of this kind of partnership, achieving a TV audience reach alone of over 15 million.

Taking the approach of Great Places, the Destination Partnership might set targets for a tourism-related investment, such as a Great Places 2 that could be built up via a range of projects once the Destination Partnership agrees the priorities. Projects such as the resident's festival may be eligible to apply for Arts Council England funding. Alternatively, the Partnership could decide to source funding on a project by project basis.

Not all of the funding sources listed above will be viable or appropriate for Coventry but by building up a mixed portfolio of funding and using existing resources as leverage (something the city has already demonstrated it is quite adept at) a substantial fighting fund could be established to deliver the DMP and Digital Audit work areas and activity.

## **Destination Management Plan**

This document supports the Coventry Destination Management Plan and should be used within the context of the plan. All information within this document is the property of Coventry City Council and the Destination Partnership. Any information within this paper should only be used with the permission of this group.

## Structure

Delivering the Destination Management Plan requires the expertise, resource and funding of a range of stakeholders. The Destination Management Plan will be delivered via a destination partnership containing the organisations outlined here.

The partnership will deliver greater collaboration between stakeholders in order to maximise the resources and people driving and delivering Coventry's visitor economy.

More details around the proposed structure and resources can be found in the accompanying report 3.



