

Gloucester City Council

Meeting:	Cabinet	Date:	7th March 2018
Subject:	Growing Gloucester's Visitor Economy Action Plan Annual Update 2017		
Report Of:	Cabinet Member for Culture and Leisure		
Wards Affected:	All		
Key Decision:	No	Budget/Policy Framework:	No
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Appendices:	None		

FOR GENERAL RELEASE

1.0 Purpose of Report

- 1.1 To update Councillors on the progress that has been made in achieving the Growing Gloucester's Visitor Economy Action Plan during 2017.

2.0 Recommendations

- 2.1 Cabinet is asked to **RESOLVE** that:

- (1) the 2017 actions to deliver the Growing Gloucester's Visitor Economy Action Plan be noted;
- (2) the activities undertaken by various partners are recognised as contributing to the 'Growing Gloucester Visitor Economy' aims and objectives;
- (3) the Action Plan supporting the delivery of the Strategy be reviewed and updated during 2018.

3.0 Background and Key Issues

- 3.1 The Growing Gloucester's Visitor Economy Strategy was produced in 2014 and Marketing Gloucester Ltd was tasked with delivering the strategy as part of its business development, marketing and tourist promotion remit. The CEO of Marketing Gloucester Ltd took responsibility for the strategy and accompanying Action Plan with support from the City Council.
- 3.2 The strategy underwent a consultation process, allowing stakeholders and interested parties the opportunity to feed into the strategy, which was adopted in December 2014.

3.3 Since the launch of this strategy independent research has shown that the visitor economy in Gloucester is growing faster than any other area in the county, with total visitor spend in Gloucester in 2016 exceeding £204 million, a 71% increase from 2013 and a very large increase in day visitors to 3.1 million a year in 2016 from 2 million in 2013. According to the same research over 4,000 jobs (c. 3,000 FTE) are supported by tourism in Gloucester equivalent to 7% of total employment in the city with an additional 1,300 jobs created since 2013. There has also been a 13% growth in hotel bookings over the period.

3.4 Three broad areas need to be addressed to maximise growth over the life of the strategy:

- Continuing to improve the quality of the visitor experience;
- Increasing visitor accommodation in the city by 1,800 rooms;
- Continue enhanced promotion of the city.

3.5 Marketing Gloucester is the official Destination Management Organisation for the city which maintains relationships with Visit Britain and Visit England, manages the official website for the city and produces official visitor guides.

4.0 Progress to date and new initiatives

4.1 A SWOT analysis was produced as part of the visitor economy strategy. It is very encouraging to note that many of the weaknesses and threats have been addressed or are showing progress in being addressed, and many of the opportunities being taking advantage of through positive actions including those on the action plan and by building on strengths.

4.2 The 2014 Action Plan, developed to support delivery of the Visitor Economy Strategy, is now over three years old. The update which follows demonstrates that significant work has been delivered to address the issues and opportunities identified in the Strategy and that this work has had a positive impact on the city.

During 2018 it would be useful to review the action plan and consider what aspects need to be revised, what needs to be reprioritised, what should be added and what can be classified as complete. This will help manage future activities and actions.

4.3 Updates on the action plan include:

4.3.1 Progress on HLF projects

In the 2014 strategy the HLF funded refurbishment of Llanthony Priory, St Mary de Crypt, Project Pilgrim at Gloucester Cathedral plus the refurbishment of Soldiers of Gloucestershire and Waterways museum were all highlighted as opportunities for creating attractions that gave compelling reasons to visit. Soldiers of Gloucestershire and Waterways museum refurbishments have taken place and created modern attractions. In 2017 the important refurbishment of Llanthony Priory, St Mary de Crypt, Project Pilgrim at Gloucester Cathedral were commenced and are due to be completed during 2018. It is expected that the completion of these projects will help drive higher visitor numbers. Marketing Gloucester estimate

that the completion of these projects will add up to 400,000 to visitor numbers to the city by 2019 compared with 2017.

4.3.2 Aethelflaed and Civil War events

As demonstrated by celebrations of the anniversary of Richard III and Henry III in 2016, anniversaries can be excellent opportunities to promote the city to local, national and international visitors. Both of the 2016 events received wide coverage with the Henry III celebrations organised by Marketing Gloucester and the Cathedral getting widespread international TV and press coverage including in China and Italy. 2018 marks two important anniversaries for the city, the 1100th anniversary of the death of Aethelflaed and 375 years since the lifting of the siege of Gloucester. For these anniversaries the Culture Trust has piloted a new method of working through an inclusive steering committee chaired by the cabinet member for culture and leisure. A full programme of events is in the process of being confirmed. In addition to the Trust's co-ordinating and enabling role, partners across the city will be delivering elements of the celebrations including: the Museum of Gloucester, Gloucester History Festival, Court Leet of Barton St Mary, Marketing Gloucester and Gloucester BID. Marketing Gloucester will also be supporting the celebrations with a dedicated, event-wide, marketing campaign.

4.3.3 USA Connections Project

Marketing Gloucester is the official Destination Management Organisation for the city and in 2017 has bid successfully for part of a £580,000 grant from VisitEngland in a collaborative project to develop a range of experiences directed at the US tourism market. 'Connections' will produce a series of new, immersive, bookable English-themed visitor experiences specifically for the American market, encouraging visitors to explore England beyond London. The experiences will aim to tap in to the fascination of the many connections between England and America – a shared history, language, culture and ancestry. In an effort to inspire many visitors to discover their roots and the authenticity of local English culture.

A large-scale collaboration between 13 destinations, Connections will develop tourism products in the lead up to 2020, the 400th anniversary of the Mayflower's historic voyage from Plymouth to the New World. Gloucester along with Bristol, Cambridge, Cornwall, Essex, Hampshire, Hertfordshire, Kent, Lincolnshire, Nottinghamshire, Plymouth, Torbay and Worcestershire will look into themes with significant appeal to US visitors, such as Magna Carta and the rule of law, The writer of the American National Anthem, George Whitfield, The Mayflower, Virginia and early American colonisation, WW2, US military and the 'special relationship'.

The project also aims to showcase the best of England's culture and heritage through the development of a broad range of specialist guided tours and behind the scenes experiences and will be sold in the US via tour operators and travel agents. There were 2.9 million overseas visits to the UK from January to July in 2017 from North America alone, an increase of 21% on the same period last year.

This funding will have a huge impact on tourism for the city of Gloucester from the USA market, and will help build on the phenomenal growth the city has shown over the last five years. Marketing Gloucester is the lead organisation for PR for the 13 destinations. Encouragingly, to date the city has had the highest response on

product audit of all destinations in the project with 16 attractions in the city engaging.

4.3.4 Bus station, plans for the railway station and other regeneration projects

There has been significant progress on regeneration projects throughout the city including at Blackfriars carpark, Black Dog Way, Bakers Quay and the Southgate Townscape Heritage Initiative all of which are improving the Gloucester product and attractiveness to visitors.

The bus station and railway station are important gateways to the city and highlighted as priorities within the SWOT analysis. Gloucester is fortunate in having its transport hub within the city centre and within easy walking distance to many of its attractions. In 2017 work commenced on the development of an architect designed state of the art bus station, which in 2018 will be the first part of the new Kings Quarter development to be completed. The City Council is currently awaiting the outcome of a bid to GFirst LEP to deliver improvements to the railway station and its immediate environment including the underpass to Great Western Road. The outcome is expected to be heard shortly and, if successful, work would commence on site in 2020.

The major investment planned for the Kings Walk shopping centre, driven by the City Council and Reef Estates, will significantly enhance the city centre offer. The plans include “repositioning” the shopping centre to include more leisure uses such as restaurants, as well as physical improvements to the fabric of the centre and improving the quality and variety of retailers. These plans complement the emerging wider proposals for Kings Quarter.

4.3.5 Work with coach operators

Coach operators are an important channel for delivery of visitors to Gloucester for example over three days Gloucester Tall Ships event in 2017 approximately 3,600 visitors arrived by organised coach tours. Development of bookable product is key to encouraging coach operators to include Gloucester on their itineraries. Whilst primarily aimed at the USA market, the USA connections project will be key in the development of bookable product – i.e. development of a bookable itinerary. Marketing Gloucester invests in advertising to the coach tour operators and the Visitor Experience Team manage a database for direct marketing. Currently there is no meet and great service for coach parties, but it is anticipated that Gloucester BID will be developing this service.

4.3.6 New/expanded hotels

It was highlighted within the strategy Growing Gloucestershire’s Visitor Economy that by 2025 Gloucester would need an additional 1,800 room for potential demand. Across all accommodation types, latest independent figures show an extremely high 87% occupancy rate of bed space in the city indicating that the need is as projected.

Much work has been done by the teams at Gloucester City Council and Marketing Gloucester to produce independent research and communicate the opportunities the city offers to hotel operators, developers and brands. Meetings have been held

with the significant hotel Groups which operate in the UK and smaller independent hotel management and investor organisations. Unsurprisingly there has been a high degree of interest which has been generated directly through the marketing to these organisations.

Since the publication of the Growing Gloucester's Visitor Economy strategy, developments have included the opening of the Central Hotel, the planned expansion the New County Hotel, the acquisition of New Inn and Station Hotel by American group Dominion Hospitality and an additional 300 rooms being added to AirBNB within the area.

2018 looks to be an exciting year as much of the efforts gone into communicating the demand for extra hotel development in Gloucester will likely be demonstrated to be paying off. Currently being constructed is a 104 room Premier Inn at Gloucester Quays which is due to open summer 2018. In 2017 hotel operators and brands have expressed interest in a number of sites in Gloucester and much work that has been going preparing future plans for sites that have been identified as having potential for hotels including Herbert Kimberly and Phillpotts Warehouses which would make an ideal location for the first city centre four-star hotel with up to 140 rooms and conferencing and banqueting facilities. Much work has been done on preparing The Fleece Hotel to be developer ready and it is expected that further progress on this will be made towards redevelopment of this important historic site potentially including the provision of boutique hotel accommodation. Multiple operators have also expressed interest in developing a 3* or 4* hotel within the Kings Quarter development.

4.3.7 Events

The events in the city delivered by Marketing Gloucester, Gloucester Cathedral, Gloucester Quays, Strike A Light and other partners have been shown to have a significant economic and reputational impact. Gloucester Culture Trust commissioned a recently published report on the 2017 events and will be proposing a strategy for events that is focussed on maximising the city's potential and building a broad, co-ordinated, city-wide events partnership to make Gloucester ready to bid for UK City of Culture in 2025.

The newly established Gloucester BID have a stated aim of delivering mass appeal footfall driving events which will likely have an effect on the visitor economy the five years of its establishment.

4.3.8 Product development

In 2017 Gloucester was successful in a "Great Place" bid and was granted £1.49m towards a 3-year programme valued at £3.1m including match funding. "Great Place" Strand 4 is related to Destination Marketing and is led by Marketing Gloucester. Key to this is needs analysis and development of methods for attractions and events organisers to be able to coordinate and promote events. Work is going on with key attractions in the city and producers of content to help them develop channels for marketing and audience development. One of the likely outputs is the further development of the GL card, which since April 2017 has attracted 5,000 users of its app, 10,000 cards issued and nearly 5,000 followers on Twitter. This will be a valuable tool for promoting to visitors and residents.

Planning permission has been granted for digital wayfinding through the city which will provide multi-lingual information for residents and visitors. This should be installed 2018/19.

4.3.9 Tourist Information

During 2017 Gloucester was awarded the title of Visitor Information Provider of the year, meaning that Gloucester's provision of Tourist Information was judged to be the best of those assessed in England and able to demonstrate commitment to customer service and satisfaction and business success together with a website (viewed on desktop, mobile and tablet), and any other online presence including social media. Increasingly Visit England and Visit Britain are recognising that traditional TIC's are a part of the changing delivery system for tourist information, with apps, websites, social media, peer to peer and other digital methods becoming as important and likely to become increasingly so.

With the launch of the UK:DRIC (UK Digital Retail Innovation Centre) in Gloucester supported by a £400,000 grant to Marketing Gloucester from Gfirst LEP there will be a continued emphasis on ensuring Gloucester sets a gold standard for provision of tourist information across all channels including digital. Marketing Gloucester will be looking to support the Visitor Experience Team in testing and developing new technologies, building on the success of the digital booth which has already been installed in Gloucester TIC. Capacity and floor space for digital wayfinding is being built into the new Gloucester Bus Station and the option exists to establish a digital visitor orientation facility to coincide with the station opening. Marketing Gloucester Ltd have been invited to present a proposal/business case for how the facility could be delivered, operated and funded to be received by 16 March 2018.

4.3.10 Gloucester City Centre and the BID

In 2017 Marketing Gloucester led on the development and establishment of Gloucester Business Improvement District. The Gloucester BID will bring an additional £2.4 million of investment into the city, much of which will support the aims of the visitor economy strategy, although are additional to those services committed to by Gloucester City Council. Already in 2017 and early 2018, there have been benefits shown in city cleanliness and safety through the BID's City Protection Officers who are also part funded by Gloucester City Council and Gloucestershire Police and Crime Commissioner's Office.

From 2018 until 2020 Gloucester BID have allocated funding to support or deliver events that will drive footfall and marketing budget to promote the city through advertising, signage and PR. All of these developments will help improve visitor experience.

During 2017 the City Council and a broad range of partner organisations have been preparing the bid for Purple Flag status for the City's night-time economy. This work culminated in a comprehensive self-assessment in November 2017 following which the City Council made its application in January 2018. We expect to hear the result later this year.

4.3.11 Gloucester Quays

The positive impact on the visitor economy of Gloucester Quays and Docks are becoming increasingly important. Peel group have a stated aspiration to grow the offering at Gloucester Quays to enable the city to be able to compete as a destination with Bicester Village. Successes in bringing significant brands to the city including Cath Kidson, Joules, Ted Baker and Jack Wills show great progress to date. If it continues it could change the profile of visitors and greatly increase foreign tourists making visits from elsewhere; it would in particular lead to a large surge in tourists from China. Footfall is expected to grow further in 2018 and have a positive impact on spill over footfall into the historic city centre.

5.0 Asset Based Community Development (ABCD) Considerations

- 5.1 A key aspect of the Growing Gloucester's Visitor Economy Strategy is to draw on the strengths of the city's communities – groups of people who get involved in celebrating all the city has to offer. Whether this is through community days and events or through city events such as Gloucester Day or the Carnival, all of these highlight the benefit of encouraging communities to promote and celebrate everything that is good about the city.
- 5.2 More and a wider range of local people are becoming engaged with the city's developing cultural offer (please refer to Gloucester City Council Festivals & Events Report January 2018).
- 5.3 The visitor economy supports over 4000 jobs (c. 3000 FTE) are supported by tourism in Gloucester equivalent to 7% of total employment in the city with an additional 1,300 jobs created since 2013. There has also been a 13% growth in hotel bookings over the period. Centre for Cities has predicted that following Brexit, tourism will be an important potential growth area for the UK. Continued support for this sector is recommended in order to ensure the health of the local economy

6.0 Alternative Options Considered

- 6.1 The Visitor Economy Strategy has previously been adopted and so the Action Plan reflects the priorities set within in. Alternative options were considered during strategy development but subsequent activity as been focussed on achieving the approved strategic objectives.

7.0 Reasons for Recommendations

- 7.1 2017 has been a significant year for Gloucester in terms of its visitor economy and its cultural development.
- 7.2 The Gloucester Culture Board has driven the establishment of a Charitable Trust to help put culture at the heart of the city.
- 7.3 The Board is managing the delivery of a 3-year, £3.1m Great Place Programme with £1.49m of external funding secured from an Arts Council England/Heritage Lottery Fund/Historic England through the National Lottery. The Programme is leading seven ambitious strands of activity that will have a positive and lasting

impact on the City's cultural profile and demonstrate to visitors that Gloucester is a Great Place.

- 7.4 A new partnership with the Roundhouse Theatre, Camden brings the experience and support of a nationally recognised partner to Gloucester to push the City's cultural development and sharpen our focus on young people. In addition a £200,000 grant from the Paul Hamlyn Foundation supports this partnership and shows the ability of Gloucester to win significant external financial support to deliver its cultural ambitions.
- 7.5 In 2017 Marketing Gloucester were successful in bidding to Visit Britain to be beneficiaries of the £580,000 DEF US Connections fund, which will be developing bookable product with attractions in the city and promoting these to the UK market ready for the Mayflower 400 celebrations in 2020. Marketing Gloucester is the PR lead for the 13 UK partner destinations.
- 7.6 This update provides an opportunity to reflect on the impact of the actions and the achievements made by all parties involved but also to make note of the areas which may not have performed so highly during the year.
- 7.7 It is important to acknowledge all partners involved in the delivery of the Action Plan and to encourage all stakeholders and interested parties to think about the role they play in delivering the Action Plan. We need to work collectively and in partnership to achieve the vision set out in the Strategy and ensure adequate resources are allocated.

8.0 Future Work and Conclusions

- 8.1 The Growing Gloucester's Visitor Economy Strategy will continue to be evaluated on an annual basis reflecting on the achievements and way forward. During 2018 a review of the Action Plan is proposed.

9.0 Financial Implications

- 9.1 There are no direct financial implications to the City Council arising from the contents of this report.

(Financial Services have been consulted in the preparation this report.)

10.0 Legal Implications

- 10.1 There are no specific legal implications relating to this report other than to note that Marketing Gloucester Limited is a company wholly owned by the City Council.

(One Legal have been consulted in the preparation this report.)

11.0 Risk & Opportunity Management Implications

- 11.1 None at this stage. Appropriate risk management will be undertaken for each City Council project as they arise.

12.0 People Impact Assessment (PIA) and Safeguarding:

12.1 The PIA Screening Stage was completed and did not identify any potential or actual negative impact, therefore a full PIA was not required.

13.0 Other Corporate Implications

Community Safety

13.1 Safety requirements will be addressed by a lead officer/manager within each individual delivered project.

Sustainability

13.2 Sustainability issues will be addressed within individual projects within the action plan.

Staffing & Trade Union

13.3 Not applicable.