

Worcester City Tourism Strategy 2017-2022

Supporting Information

Appendices

		Page Number
Appendix 1	National Trends	1
Appendix 2	Worcester City Plan 2016-2021 and Tourism	3
Appendix 3	South Worcestershire Development Plan and Tourism	5
Appendix 4	Worcester City's Tourism Offer	6
Appendix 5	Heritage Assets	8
Appendix 6	Stakeholder Consultation	10
Appendix 7	Tourism Consultation Event	11
Appendix 8	SWOT Analysis	13
Appendix 9	Tourism Business Survey	16
Appendix 10	Visitor Survey	17
Appendix 11	Residents Survey	19
Appendix 12	Councillor Consultation Event	21
Appendix 13	Local Transport Plans	23
Appendix 14	Competitor/Comparator Analysis	25

Appendix 1 - National Trends¹

Population and Social Change Trends

- Families are changing in size, shape and composition
- A baby boom and an ageing society will see an emphasis on the intergenerational family holiday
- Grandparents will be 'younger' than ever before, and retiring baby boomers will prioritise their leisure time
- A sharp rise in the number of over-80's will see a generation keen to go on holiday but potentially reluctant (or unable) to travel far
- Reduction in the number of 35-49 year olds leading to a 'squeezed middle generation' who will be time poor and willing to treat themselves

Economic and Recession Trends

The economic downturn has provided an unexpected boost for domestic tourism as consumers have swapped overseas trips for domestic ones, but the recession has created a consumer savvy environment, whereby consumers seek value for money experiences and want to feel like they are getting a bargain.

- Desire for value evident at all sections of the market, including the luxury end
- Increased trend for shorter breaks or for combining VFR (visiting friends and relatives) with leisure trips
- Appetite for domestic leisure experiences is increasing with 'Staycations' likely to be maintained during recovery

Technology Trends

On-going technological advancements will have a transformative effect on the future of domestic leisure tourism. The level of access to information via the Internet has already revolutionised the way consumer's research, book and manage their leisure time. Mobile Internet technology, although still in its infancy, will allow destinations and businesses to enhance the actual tourism experience in the future.

- A heightened need for wireless Internet access whilst on holiday and increasingly responsive and personalised services whilst away from home
- Rise of social media for reviews and sharing of experiences between friends, family and strangers.
- Social media will heighten the fear of missing out and catalyst desire for broader leisure portfolios and new experiences
- Increase in the proportion of 55-64 year olds using the internet on a mobile device from 5% to 27% since 2009. (Ofcom)
- 'Mobile first' is a crucial trend for tourism businesses to recognise with a huge shift from laptops and PCs to smartphones and tablets
- Last minute trend will increase to grow
- Increasing demand for what tourism businesses and different destinations have to offer—leading to immersive tours or maps of activities in the local area. Augmented Reality (AR) and holograms are already been developed to facilitate this.
- Leisure trips in England will be increasingly affected by consumers' use of technology
- A continued increase in purchasing city breaks and holidays online via Online Travel Agents
- Increase use of 'home away from home' websites like Airbnb and HomeAway

¹ Source: VisitBritain Domestic Trends Report 2013

Consumer Trends

Whilst the Office for National Statistics indicates that while households cut back on spending overall during the economic downturn, spending on recreation and culture actually increased. The desire for different types of holidays will continue to increase over the next decade with leisure portfolios continuing to grow.

- Consumers will be more ethically shrewd from environmental concerns to a more holistic sustainability agenda—and will not expect to pay a premium
- More consumers will use their leisure time to learn a new skill or acquire new knowledge
- Growth in consumers seeking out experiences (cuisine, cultural and hobbies)

Tourism Trends

Economic, social, consumer and technological trends are driving new types of domestic tourism.

- Time poor and cash strapped consumers will look to maximise their leisure spend
- Increasing number of short breaks at the expense of longer holidays
- Increase in visitors wanting self-catering accommodation
- Growing importance given to cultural capital—learning new skills or acquiring knowledge—craft tourism/active tourism/heritage tourism
- Increase in (VFR) visiting friends and relatives market
- Increase in cultural tourism and the importance of nostalgia tourism
- Increase in health consciousness
- Ageing population means facilities for visitors with reduced mobility needs to be high on the agenda
- Next generation of retired consumers are 'younger' and more active
- An increased desire for new experiences
- Essential different destinations work together to communicate the overall tourism experience rather than competing for footfall
- Desire for personalised, tailored products and services
- Consumers using fewer sources of traditional information whether guide books or tourism bodies
- Increasingly receptive to new sources of information such as Trip Advisor, but also others than cater for specific requirements, such as new app technology like Field Trip and Gravy.

National tourism trends recognise major tourism growth in heritage tourism, festivals and events tourism, as well as sports tourism.

Appendix 2 - Worcester City Plan 2016-2021 and Tourism

The City Plan is split into five themes. The information below sets out how tourism is related to each of the strategic themes.

1) Stronger & Connected Communities

- a) Tourism will help to build a sense of pride in the City
- b) Local residents will be able to participate in arts, culture and heritage activities helping to ensure social inclusion as well as developing a unique visitor experience
- c) Worcester will be a recognised City for accessibility - meeting the needs of all residents and visitors

2) A Prosperous City

- a) Tourism will help to improve the profile of the City enabling it to become nationally and internationally recognised as a good investment opportunity
- b) Tourism is an excellent sector for entry level employment
- c) Ensuring Worcester is forward thinking and innovative by keeping up-to-date with technology advancements, in line with other heritage cities
- d) Ensuring local education establishments are training young people and those from disadvantaged groups in customer service, food hygiene, cash handling to help them into employment
- e) Work with investors and tourism developers to broaden Worcester City's tourism offer and ensure Worcester is able to compete against other UK destinations
- f) High speed broadband access will help to improve the visitor experience by making it easier to access information about the City with ability to download information faster
- g) Essential transport improvements will ensure the City can increase in volume of visitors and access new markets
- h) Developing a thriving night time economy will help to attract overnight visitors

3) A Healthy and Active City

- a) Worcester's reputation as a sports tourism destination will ensure visitors continue to visit the City to watch First Division cricket, Premiership rugby and basketball, horse-racing and inclusive sports.
- b) Tourism ensures Worcester's green spaces are managed effectively ensuring Worcester is an attractive destination to visit and to encourage health and well-being amongst residents
- c) Increasing the number of walking and cycling routes throughout the City will enable Worcester to be more attractive to active visitors
- d) Tourism will help to increase the number of spectators to help develop the cultural and arts offer in a variety of settings and venues

4) A Heritage City for the 21st Century

- a) Working with a wide variety of Partners to put Worcester on the map nationally and internationally
- b) Worcester's role in the Civil War to be widely recognised
- c) Increasing international awareness of the visit of Thomas Jefferson and John Adams
- d) Enhancing and co-ordinating the City's tourism offer and increasing numbers and visitor spend
- e) Being welcoming and attractive to all
- f) Developing an attractive offer for people of all ages, genders, ethnicities, sexuality, abilities and beliefs
- g) Promoting and celebrating nationally and internationally the Uniquely Worcester offer
- h) Better promotion and utilisation of the City's historical buildings

- i) Seeking Heritage City status to acknowledge and boost Worcester's status as a heritage destination
- j) Meeting the need for hotel provision for a wide range of different visitors

5) Sustaining and Improving Our Assets

- a) Ensuring the City is beautiful will help to attract new and repeat visitors
- b) Maintaining and enhancing the City's bio-diversity will help to ensure the environment is managed sustainably
- c) Sourcing renewable energy suppliers and encouraging businesses to be more environmentally friendly will make Worcester an attractive 'green' tourism destination
- d) Enhancing natural assets such as parks, green spaces and waterways will encourage more visitors
- e) Development of a new foot bridge linking Gheluvelt and Kepax Parks will make Worcester even more attractive destination for visitors
- f) Historic buildings can be utilised more effectively to encourage more visitors

Appendix 3 - South Worcestershire Development Plan

The tourism and leisure section of the Plan states that tourism development will be permitted where the following criteria are met:

- i. The development is compatible with the physical character of the area.
- ii. The significance of heritage assets and their setting is conserved and, where appropriate, enhanced.
- iii. The public enjoyment and understanding of the historic and natural environment is promoted.
- iv. Where schemes are proposed on greenfield land, consideration has been given to the availability of alternative brownfield sites.
- v. Appropriate provision is made for access and vehicular parking facilities (including coach parks, where appropriate).
- vi. The site is readily and safely accessible by means of transport other than the private car.

There are no specific site allocations for tourism within the City boundary, however, the following allocations may be of relevance:

- Nunnery Way (SWDP43/20) mixed use allocation to include a restaurant and public house
- SWDP44/r – The bridge Inn, Lowesmoor terrace – replacement public house and residential
- SWDP43/aa – Lowesmoor Wharf – commercial and residential
- SWDP43/ac – Cavalier Public House - replacement public house and residential
- Retail led development sites allocated under SWDP44 -Cathedral Square; Fire Station/ Crown gate/ Angel Place/The Butts; and Trinity House/Cornmarket -all thee allocation provide opportunities to improve the public realm and connectivity throughout the City Centre
- Opportunity Zones allocated under policy SWDP44 - Shrub Hill – residential with a mix of commercial uses; Blockhouse/Carden Street – residential led; Cathedral Quarter and Sidbury – cultural facilities.

New opportunities will emerge for tourism development during this five year Tourism Strategy.

Appendix 4 - Worcester City's Tourism Offer

Heritage Attractions

- Worcester Cathedral
- Worcester Guildhall
- Worcester City Art Gallery & Museum
- The Commandery
- Museum of Royal Worcester
- The Greyfriars' House & Garden
- Tudor House Museum
- Sir Edward Elgar Statue
- Churches (St. Swithun's, St. Helen's, All Saint's and St. George's Roman Catholic Church)
- Historic Friar Street and New Street
- Worcester Riverside Park
- The Ghost Walk of Worcester (Worcester Live)
- Worcester Walks
- Discover History
- Worcester City Heritage Trails (Battle of Worcester Trail, Elgar Walking Trail, Elgar Driving Route, Blue Plaque Trail and Heritage Walk)

Arts & Entertainment Venues

- The Swan Theatre (Worcester Live)
- Huntingdon Hall (Worcester Live)
- Worcester Arts Workshop
- Marris Bar
- Cinemas (Odeon and Vue)
- Bowling alleys (MFA Bowl and Bowl Xtreme)
- Nightclubs, pubs and bars

Sports Venues

- Worcestershire County Cricket Club
- Worcester Warriors
- Worcester Racecourse
- University of Worcester Arena (Worcester Wolves and inclusive sports)
- Sports centres (Perdiswell Leisure Centre and Swimming Pool, St. John's Sport's Centre and Nunnery Wood Sports Centre)
- Golf courses (Ravenmeadow Golf Club and Worcester Golf and Country Club)

Shopping

- CrownGate Shopping Centre
- Reindeer Court Shopping Centre
- Hop Market
- Independent shops and High Street retailers
- Shopping - art galleries, antique shops and jewellers
- Boutique clothes shopping (Friar Street and New Street)
- Markets (Angel Place, Up-markets and Festival Markets on the High Street and the Riverside Market)

Green Spaces and Environmental Attractions

- Worcester Woods Country Park
- Parks (Gheluvelt Park, Fort Royal Park and Cripplegate Park)
- Pump House Environment Centre
- Chapter Meadows

- Diglis Playing Fields
- Walking and cycling routes and trails (Northwick Manor Trail, The Severn Way and the river and canal network)

Accommodation

- City Centre Hotels (Diglis House Hotel, Worcester Whitehouse Hotel, Riverside Premier Inn, The Fownes Hotel, Worcester Travelodge (Cathedral Square) and Severn View Hotel)
- Country House Hotels not within City boundaries (Stanbrook Abbey, Bank House Hotel & Golf & Spa and Pear Tree Hotel & Country Club)
- Inn's (The Cardinals' Hat, Ye Olde Talbot and The Crown Hotel – Wetherspoons)
- B&B's (Rooms at The Quay, Wyatt Guest House, Holland House, Osbourne House, Shrubbery Guest House, Shrubbery House, Welland House, Lansdowne House, Laburnum Villa, Church House B&B, Pitmaston House and Manor Coach House)
- Self-Catering (Worcester City Centre Cottage, Worcester Boutique Suites, Tredennyke House, No 1 Diglis Lock Cottage, Four Seasons and Pips Apples and Pears Self-Catering)
- Groups – University of Worcester

Festivals & Events

- Three Choirs Festival
- Worcester Victorian Christmas Fayre
- Elgar Festival (new for 2017)
- Worcester Foodie Festival
- Worcester Motor Festival
- Worcester Festival
- Worcester Music Festival
- Worcestershire Lit & Fringe Festival
- Battle HQ at The Commandery (commemoration of the Battle of Worcester)
- Worcester CAMRA Beer, Cider & Perry Festival
- Worcester Show
- Worcester City 10K Run and Worcester City Run Bike Run
- Dragon Boat Festival

Eating Out

- Independent coffee shops and restaurants
- Chain coffee shops and restaurants
- Selection of international cuisine (Thai, Indian, Chinese, Mexican, French and Italian)

Appendix 5 - Heritage Indicators

Designated heritage assets	
Scheduled monument	25
Listed buildings all grades (no of listings)	714
Listed buildings all grades (no of buildings)	1039
Listed building Grade I (no of listings)	14
Listed building Grade I (no of buildings)	14
Listed building Grade II* (no of listings)	41
Listed building Grade II* (no of buildings)	45
Listed building Grade II (no of listings)	659
Listed building Grade II (no of buildings)	980
Registered battlefield	1
Registered park / garden	1
Conservation area	18
Locally listed heritage assets	
Locally listed building or structure (no of listings)	145
Locally listed building or structure (no of buildings)	241
Records	
Historic Environment Record – monument records	3274
Historic Environment Record – event records	2200

Key heritage assets

Selected major historic buildings and structures, and groups of buildings

- Cathedral and precinct buildings and ruins
- Old Palace
- Commandery
- Guildhall
- Greyfriars
- Museum and Art Gallery
- Shirehall
- City walls (including gate plaques)
- Infirmary
- Medieval and 18th century churches
- Timber-framed and brick buildings in eg Friar St, Foregate St and elsewhere
- Planned suburbs at Britannia Square, Lark Hill, Lansdowne Crescent and St Georges Square

- Powick Bridge and Mills
- Warndon Church and Court
- Industrial heritage including Royal Worcester Porcelain (ERIH), canal, railway, etc

Earthwork and other sites

- Middle Battenhall Farm
- Earls Court
- Fort Royal
- Tamar Close Civil War siegework
- Battlefield
- Ancient woodlands (Perry, Nunnery, Warndon)

Archaeological remains in city centre comprising the record of over 2500 years of occupation

Key Timeline

Around 500 BC	First construction of earthwork defences in what is now Worcester city centre.
AD 50	Romans arrive in Worcester. After this an industrial and market town develops.
680	A bishopric is established in the Worcester, then the main town of the Anglo-Saxon Hwicce tribe, and the first cathedral is built shortly afterwards.
1041	Worcester is sacked following the killing of two tax collectors.
1069	Worcester Castle built by the Norman Urse d'Abitot.
1084	The rebuilding of the cathedral begins, two decades after the Norman Conquest.
1189	Worcester's first royal charter granted by Richard I.
1216	King John buried at Worcester, one year after signing the Magna Carta.
1642	Battle of Powick Bridge marks the start of the Civil War in England.
1651	Battle of Worcester, the last battle of the Civil War. Oliver Cromwell defeats Charles II's army.
1690	Berrow's Worcester Journal first published (regular publication from 1709).
1746	Worcester's first infirmary opens.
1751	First manufacture of porcelain in Worcester.
1815	Opening of Worcester and Birmingham Canal.
1837	Lea and Perrins Worcestershire Sauce is first sold to the public.
1850	The railway reaches Worcester (Shrub Hill Station opened).
1865	Worcestershire County Cricket Club formed.

Appendix 6 – Stakeholder Consultation

The strategy has been based on extensive research and consultation with tourism industry stakeholders and desk research including:

- Working through current policy documents, research studies and reports including the 2016-2021 Worcester City Plan (Appendix 9), Worcester City Vision & Master Plan, Heritage Product Development Report, Visit Worcestershire Destination Management Plan.
- Consultation on the Worcestershire County Council Local Transport Plans (Appendix 13)
- Consultation on the South Worcestershire Development Plan (Appendix 3)
- Analysing existing and future product and market trends data (Appendix 1)
- Evaluating Worcester City Economic Impact Assessments 2013/2014/2015
- Analysing a Visitor Survey conducted from July 2015 – June 2016 (Appendix 10)
- Consultation with a number of different departments at Worcester City Council including, Planning & Policy Team Leader, Economic Development Officer for Place, Local Centres Officer, Archaeological Officer, Cleaner & Greener Team & the Community Engagement Officer
- Undertaking a competitor/comparator analysis with local and national destinations (Appendix 14)
- A stakeholder workshop held on 13th July 2016 with 60 attendees (Appendices 7 and 8)
- A Councillor workshop held on 24th August 2016 (Appendix 12)
- An online residents' survey conducted in 2016 (Appendix 11)
- An online tourism business survey (Appendix 9)
- PESTLE Analysis (Appendix 12)

Appendix 7 - Tourism Consultation Event on Wednesday 13th July 2016

Anja	Anja Potza
Bank House Hotel	Lynn Darling
Browns at The Quay	Darren Pinches
Canal & River Trust	Keith Spencer
Churches Conservation Trust	Andrew Meredith
Clik Clik Collective	Kate Cox
CrownGate Shopping Centre	Erica Burlace
CrownGate Shopping Centre	Sara Matthews
Diglis House Hotel	Michelle Round
Diglis House Hotel	Steve Pirone
Discover History	Paul Harding
George Marshall Medical Museum	Louise Price
GWR	Laura Beavis
HW Chamber of Commerce	Martyn Hammond
London Midland	Steven Fisher
LSD Promotions Ltd	Dermot McGillicuddy
Museum of Royal Worcester	Amanda Savidge
Museums Worcestershire	Helen Large
Pump House Environment Centre	Roisin Hanks
The Cardinals' Hat	Sadie Hughes
The Destination Marketing Company	Phillip Cooke
The Infirmary	Mark Macleod
Three Choirs Festival	Lucy Potter
Tudor House Museum	Margaret Panter
University of Worcester	Anne Hannaford
University of Worcester Arena	April White
Visit Worcestershire	Amanda Millichip
Worcester BID	Adrian Field
Worcester BID	Nadja von Dalen
Worcester Cathedral	Susan Macleod
Worcester City Council Cabinet	Cllr. Geoff Williams
Worcester City Council	Warwick Neale
Worcester City Council - Heritage	James Dinn
Worcester City Council Business & Enterprise	Janet Yates
Worcester City Council Economic Development	Carolyn Davies
Worcester City Council Events	Helen Mole
Worcester City Council Place	Mark Radford
Worcester Civic Society	Phil Douce
Worcester Live	Chris Jaeger
Worcester Music Festival	Anthony Robbins
Worcester Re-enactors	Brian Bullock
Worcester Tourist Information Centre	Ruth Smith
Worcester Walks	Miriam Harvey

Worcester Walks	Robert Lovelace
Worcester Walks	Lynda Griffin
Worcester Whitehouse Hotel	Craig Millard
Worcestershire Archive and Archaeology Service	Adrian Gregson
Worcestershire County Council	Roy Fullee
Worcestershire County Council	Neil Anderson
Worcestershire County Council	Jay Aulum
Worcestershire County Council - Transport	Matt Stone
Worcestershire County Council - Transport	Martin Rowe
Worcestershire Local Enterprise Partnership	David Irish

Appendix 8 – SWOT (Strengths, Weaknesses, Opportunities and Threats) Analysis

Stakeholders were asked to complete a SWOT analysis as part of the workshop.

Strengths	Weaknesses
<p>Infrastructure</p> <ul style="list-style-type: none"> ○ Central location ○ Strong Business Improvement District ○ Knowledgeable TIC <p>Product</p> <ul style="list-style-type: none"> ○ Heritage attractions ○ Worcester Cathedral ○ River and canals ○ Sporting venues ○ University of Worcester ○ 21st Century Buildings ○ Parks and open spaces ○ Good mix of shops and restaurants ○ Independent retailers ○ Elgar and other historical figures ○ Festival and events programme ○ Low crime/safe city 	<p>Infrastructure</p> <ul style="list-style-type: none"> ○ Congestion ○ Coach parking ○ Frequency and connection to London/Birmingham/Bristol ○ Lorries parking in City ○ Public transport particularly in the evenings ○ Parking costs ○ Signage <p>Product</p> <ul style="list-style-type: none"> ○ Insufficient accommodation quality and capacity ○ Not being considered a business tourism destination ○ Guildhall under exploited ○ Lack of a Worcester tourism experience particularly on Sundays (Sundays) ○ Opening hours at the TIC (closed on Sundays) ○ Opening hours at Museums (closed on Sundays) ○ Not enough shops open on a Sunday ○ Seagulls ○ Weak evening café culture <p>Developments</p> <ul style="list-style-type: none"> ○ High NNDR which may hinder new businesses setting up in the City ○ Lack of space for contemporary artists <p>Marketing and Promotion</p> <ul style="list-style-type: none"> ○ Branding ○ Lack of City focussed marketing and promotion ○ Footfall

Opportunities	Threats
<p data-bbox="177 172 762 2045">Infrastructure</p> <ul data-bbox="177 241 762 488" style="list-style-type: none"> ○ Worcester Parkway ○ Better signage on M5 ○ Improved riverside signage ○ Increase opportunities and promotion for sustainable transport ○ <p data-bbox="177 524 762 560">Product</p> <ul data-bbox="177 595 762 1057" style="list-style-type: none"> ○ Improvement in evening offer ○ More arts and music events ○ Community involvement ○ Cultural events and festivals with big names to draw people from outside ○ New technology ○ More conferences and business tourism events ○ Develop independent and unique retail offer ○ The likes of AirBnB could help to increase accommodation capacity <p data-bbox="177 1093 762 1128">Developments</p> <ul data-bbox="177 1164 762 1550" style="list-style-type: none"> ○ New hotel developments ○ Riverside Park ○ American Presidents Statue ○ Cathedral Square development ○ The Commandery redevelopment ○ Museum of Royal Worcester Heritage ○ Royal Porcelain Museum development ○ Investment from University of Worcester <p data-bbox="177 1585 762 1621">Marketing and promotion</p> <ul data-bbox="177 1657 762 2045" style="list-style-type: none"> ○ Discover England joint partnership projects (Mayflower 400, Majestic Waterways & EHC group) ○ English Heritage City Status ○ Environment Agency – Love Your River campaign ○ Better engagement with local press ○ Work in collaboration with neighbouring destinations and 	<p data-bbox="767 172 1385 2045">Infrastructure</p> <ul data-bbox="767 230 1385 266" style="list-style-type: none"> ○ Congestion <p data-bbox="767 288 1385 324">Product</p> <ul data-bbox="767 347 1385 674" style="list-style-type: none"> ○ Seagulls ○ Competition from other destinations ○ Bad weather ○ Online retail increasing the number of empty shops ○ Unregulated accommodation could affect the quality of the visitor experience. <p data-bbox="767 696 1385 732">Developments</p> <ul data-bbox="767 754 1385 835" style="list-style-type: none"> ○ Out of town developments ○ The UK leaving the EU (Brexit) <p data-bbox="767 857 1385 893">Marketing and Promotion</p> <ul data-bbox="767 916 1385 996" style="list-style-type: none"> ○ Media reporting of flooding ○ Funding for tourism

<p>heritage cities on a joint offer</p> <ul style="list-style-type: none">○ Increased opportunity for overseas marketing as a result of a weaker £pound.	
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Appendix 9 - Tourism Business Survey - 2016

The Tourism Strategy research included a Tourism Business Survey to help benchmark performance and to find out what the industry would like to see happen in the City to help attract more visitors.

Footfall

The attractions who responded to the Tourism Business Survey stated that the number of visitors had either increased or remained the same over the last twelve months, with the reason provided for the increase in footfall to do with the attraction improving promotion in the local area rather than attracting visitors from further afield.

Occupancy

Very few accommodation providers filled in the survey, however those accommodation providers who did respond stated that over 60% occupancy was reached in April, October, November and December, over 70% occupancy was reached in May and September and in the summer months the accommodation providers were at over 80% occupancy rate. For more information about overnight visitors, please see 4.4 Worcester City's Tourism Performance.

Improvements

The tourism businesses who responded to the survey had a varied opinion about the improvements which could be made to the City in order to attract more visitors, however overall businesses felt that the following improvements would help Worcester perform better as a visitor destination:

- Better utilisation of the riverside
- Improvements to access by road
- Improvements to public transport
- Improved signage particularly from the M5
- Reduction in seagulls
- A boutique/high quality hotel
- A brand which promotes one of Worcester's Unique Selling Points
- A larger festival and event programme
- Increase residents' pride in the City by raising awareness of Worcester's place in history
- Improve the availability of tourist information

There were also some additional recommendations:

- Encourage businesses to undertake environmental measures, increase the number of electric car charge points and encourage public transport to create a 'Green City' for marketing purposes
- Need to increase links with Stratford upon Avon to help put Worcester on the international tourist map
- Invest in large scale projects that have international appeal
- Encourage film and TV productions to be filmed in the City
- Provide incubator sites for creative start-ups to help Worcester City's creative industry to develop including providing arts and crafts workshops, exhibition space and performance areas

Appendix 10 - Visitor Survey July 2015 – June 2016

A Visitor Survey was produced between June 2015 and July 2016 to help inform the Tourism Strategy. A total of 440 parties of visitors were surveyed. The average (mean) number of people per group was approximately 2.5 giving a total of at least 1,112 people included in the survey sample.

Type of Visitor

The majority of visitors were day visitors (66%). A further 34% were visitors from other parts of the UK, either staying overnight in Worcester (20%) or visiting the area as part of a touring holiday. 4% of all visitors were from overseas.

Demographic Profile of Visitors

Across all markets, the most dominant groups interviewed were adult couples and family groups. The domestic touring market (58%) and overnight market (53%) saw higher numbers of adult couples than both day visitors (38%) and overseas visitors (33%). Visitors travelling with friends and family accounted for almost half (45%) of all day visitors. Across Worcester City, six out of ten visitors were classified as being in the ABC1 group. Over a quarter of all visitors to the City were in the DE category (26%).

New/Repeat Visitors

Almost eight out of ten respondents (79%) had visited before. The amount of new visitors coming to Worcester has fallen slightly since 2005 when almost a quarter (24%) said they were in the area for a first visit.

Length of Stay

The average length of stay for both day and touring visitors in the City was approximately 4 hours 13 minutes, this included all visitors at all locations and attractions. For UK day visitors the average stay was 4 hours 7 minutes. Domestic touring visitors stayed the longest with an average stay of 4 hours and 53 minutes. On average, overnight UK visitors spent 2.4 nights in Worcester City.

Accommodation

Serviced accommodation accounted for just over half (55%) of respondents choice of where to stay in Worcester City with 52% choosing to stay in a hotel during their stay. Just under a third (31%) were staying with friends or relatives (VFR) in the City.

Booking and Rating of Accommodation

Overnight visitors staying in the city commented on how they had booked their accommodation. The majority, 56% had pre-booked directly with their establishment, 32% had booked via the Internet on an Online Travel Agent (OTA) site such as Booking.Com and Laterooms. 2% had booked through other means including; via a family member or AirBnB.

Accommodation Quality

The majority (90%) of respondents stated that the range of accommodation available in the Worcester City area was good or very good. *(It must be noted that only 20% of respondents were staying overnight in the City)*. Only 10% stated that the range was average. The quality of service in the establishment at which they were staying received the second highest scores overall with 95% rating it as good or very good, with a mean score of 4.50. Value of money with a mean score (4.52), was the highest score given for all three options with 95% respondents stating good or very good when asked.

Mode of Transport

The Survey results show that 63% of all respondents arrive by car (including a very small percentage of hire cars), much lower than in 2005 when 74% arrived by car. The total proportion of visitors using public transport is around 30%

Activities Undertaken in Worcestershire

Visitors were asked to indicate the main activity they would be undertaking whilst on their visit to Worcestershire. General sightseeing (31%) and visiting an attraction (17%) were the primary motives for respondents to visit Worcester. New visitors were more likely to state general sightseeing (48%) as their main activity compared with 26% of repeat visitors. Shopping/looking around the shops and visiting friends/relatives were higher amongst visitors who had been before than visitors who were in the city for the first time. Almost half (45%) of all respondents stated a previous visit had encouraged them to return to Worcester. An additional 21% stated a personal recommendation / word of mouth and 4% stated the Internet and a tourism leaflet/brochure had influenced their choice to visit.

Comments about Worcester

Visitors to Worcester were impressed with the shops/shopping available and in particular the variety of independent shops on offer in the city, noted by 30% of respondents. The river was a great attraction for visitors with 29% citing this as their most liked aspect of the city, followed by architecture/old buildings (23%) and the history/heritage associated with Worcester (19%). Respondents were also asked to note what had spoilt their visit to the County. Of the comments that were made, 6% related to traffic congestion and 4% were problems finding car parking. The building/road works taking place within the city centre and around by the Elgar Statue, the lack of and cleanliness of toilets and poor road signs were identified by visitors in equal measure (3% each) as issues that spoilt their visit to Worcester City.

Evaluation of Facilities and Services for Worcester City

Using a scale from 1 – very poor, through to 3 – average to 5 – very high, visitors indicated their rating for the facilities listed in the table below. The average (mean) scores out of five are also provided.

Upkeep/Appearance	3.73
Litter Clearance	3.74
Directional Signs	3.90
Tourism signage	3.94
Welcome/Boundary Signage	4.08
Parking	3.76
Public Toilets	3.90
Shopping	3.97
Gardens and floral displays	3.87
Tourist Information	4.34

Appendix 11 - Residents Survey 2016

As part of the research for creating a sustainable tourism strategy, residents were asked to take part in a survey to help inform the direction for tourism in the City. A small sample size of over 100 residents responded to the survey.

The majority of residents (85%) surveyed said they had visited at least one of Worcester City's attractions in the past 12 months with the Cathedral, river and canal network; parks; eating out; visiting museums or shopping being the most attended activities.

Residents were then asked to rate their experience at the following: the Cathedral, Museums, Parks, River & Canal Network, Sporting Venues, Entertainment Venues, Cinema, Bowling Allies, Markets and Eating Out. The majority of respondents rated Worcester City's attractions as being either 'Good' or 'Very Good' with a few of the activities being called 'Average'. However, not many residents felt the offer was 'Poor' or 'Very Poor'.

There was a positive response from residents when they were asked whether they had attended any of the City's festivals; however the response on how they rated the experience did not perform as well as the attractions.

When residents were asked why they hadn't visited an attraction or an event, the majority of respondents said that they had attended the attractions and events in the past but felt they were not offering anything new. However, 33% of residents said they found it hard to access information to find out what was on in the City. Some respondents identified that congestion and parking charges were a main factor for not visiting an attraction or attending an event. 12% of respondents identified the reason for not visiting was because the entrance price was too expensive for them, but 36% said they found it difficult to get to the attractions and events, with comments stating that the evening bus service was insufficient and this meant they were unable to access the City Centre to attend evening events.

When asked if they were they satisfied with the number of leisure and tourism activities, most respondents felt that the number of leisure and tourism activities in the City could be improved throughout the year.

When residents were asked if the City makes the most out of its arts, culture and heritage assets over 64% stated that the City did not, however over 65% of residents said they felt proud of Worcester City's arts, culture and heritage.

Residents were asked how they felt the Worcester City's tourism offer could be improved and over 61% said by better promotion. This actually identifies that many residents do not know about the leisure and tourism activities on offer. The congestion in the City ranked in second place at 56% of respondents identifying this as a prime factor to help the tourism experience improve. Comments included that 'Worcester has good tourist potential but fails to make the most of it', website promotion needs to be improved and that many of the historic buildings are not being utilised effectively. Other comments included the offer at Worcester City Art Gallery and Museum needed to be updated and that social issues in the City Centre needed to be addressed as well as reducing the number of charity collectors. Residents also identified that in order for tourism to grow in the City a larger capacity of high quality bed stock is required.

When asked "where do residents access information for planning a day out in the City", the majority of respondents stated either via social media (44%), word of mouth (48%) or local newspapers (57%). 23% said they used the Tourist Information Centre, 33% said they used the Visit Worcestershire website and 10% said they used Visit Worcestershire Guides. Residents felt extremely frustrated that there wasn't a dedicated website to access all of the City's 'what's on' information and that the Tourist Information Centre wasn't open on a Sunday.

When asked how they think tourism benefits Worcester City the respondents stated via employment, improving the local economy and fostering conservation and preservation of the natural environment. Residents also highlighted the fact that tourism helps to improve the City's reputation nationally and internationally which can lead to inward investment.

Residents were asked whether they think there are any issues that need to be resolved and the majority felt that there were, but these ranged from litter; traffic and poor public transport, to the City needing to capitalise on its underground arts scene, better promotion of the riverside, an improved collaboration and strategic planning for the festival and event programme, the need for there to be a stronger identity for the City, as well as the management of venues paying more attention to the historic buildings that they are located in.

Appendix 12 - Worcester City Councillor Consultation

A consultation event was held for Worcester City Councillors as part of the process. The Councillors identified the following:

- A PESTLE analysis needed to be undertaken as part of the research (see below)
- The City needs to make more of the river with better access and signposting
- The target markets we are aiming to attract to the City needs to be identified. High net worth visitors were more important to attract to the City
- What is the City's Unique Selling Point (USP)
- With the increase in restaurants what will be done about the increase in rubbish being left overnight
- Business tourism will only come with improved infrastructure
- Pedestrianisation needs to be tackled in the City Centre
- Worcester City residents need to be aware of the activities to publicise to Visiting Friends and Relatives (VFR) market
- Guildhall should be a museum
- Joint ticketing for attractions and events
- Cross selling to visitors that are coming to watch sports and encourage them to stay longer.
- What is the added value for businesses adding the brand to their marketing literature
- Coach parking needs to be addressed

PESTLE Analysis (Political, Economic, Social, Technological, Legal and Environmental)

Political

- A positive step for the City has been the creation of a shared vision in the new 2016-2021 City Plan with tourism being heavily integrated
- Public spending cuts, nationally and within Worcester, which could affect tourism resources

Economic

- Impact of the recession on spending/taking short breaks
- Decline in the economy
- Continued growth of the 'Staycation' market
- Decline in business travel
- Rise in the Visiting Friends and Relatives (VFR) market, lower spend but increased opportunity
- The uncertainty of the UK exiting the EU

Social

- Aging population taking more breaks for longer
- Changes in consumer tastes/ popularity of one type of experience over another
- Increasingly consumers are looking for special offers, reductions, booking late to get deals

Technological

- Increased use of the Internet as a research and communication tool for consumers, including social networking and consumer reviews
- Expectations of the consumer for technology to be part of the delivery of an experience

Legal

- Implications of legislation and regulations. Package tour regulations, DDA compliance, insurance

Environmental

- Climate change – increased awareness of our carbon footprint yet difficulties surrounding the use of public transport since the privatisation of buses

Appendix 13 – Worcestershire County Council Local Transport Plan

Worcestershire County Council Highways department have invested into the City's infrastructure in three Local Transport Plans since 2001. The fourth Local Transport Plan (LTP 4) is currently underdevelopment and will go out to public consultation in December 2016. Please see the details below of the infrastructure developments within the four Local Transport Plans.

LTP 1 2001-2006

- High Street makeover
- Sabrina Footbridge crossing over river
- Pathway and signaling improvements

LTP 2 2006-2011

- Main focus on bus services
- Park and ride sites at Perdiswell and Sixways completed – other improvements made to west of city through St Johns for a proposed Park & Ride at Crown East which ultimately did not proceed
- Priority dedicated bus corridor through the Tything into the city centre (inbound)
- Newtown Road bus corridor (east side of the city) to Sheriff Street – street rebuild, sections of bus lane
- Air Quality Management Area designation able to be lifted as a result of changes made
- Public realm improvements

LTP 3 2011-2026

(original timespan revised as a result of national governments austerity programme)

- £150-200 million total funding required for all originally proposed schemes Including LEP funding approximately £50 million spent to date – with approximately £25 million of which spent in Worcester
- Original plans to complete ring of park and ride sites – but ultimately did not proceed due to collapse of bus transport market and lack of investment on part of bus operators and expectation for County Council to pay high sum to subsidise the service; also no viable scheme in Worcester due to the availability of cheaper car parking in the City Centre.
- Worcester Transport Strategy – £20.1M
- Key Corridor Improvements: North E Corridor from Cornmarket to Newtown Road and NW Corridor from Castle Street to Ombersley Road. Investment to improve the quality of transport infrastructure and public realm along these routes, helping to smooth traffic flows and reduce journey times, and improve conditions for all road users.
- Rail Station Enhancements: This will involve investment and improvement in passenger and interchange facilities at Worcester Foregate Street station, helping to improve the quality of rail travel and encourage increased use of these transport assets. Improvements to Worcester's Foregate Street included upgrading of signage, the ground level waiting area, information and ticketing facilities, lighting, security and improved sheltered walk links to Foregate Street and its taxi ranks and bus stops.
- Transport Information Systems: Measures to provide users with better, more accurate information on the transport network, with the aim of increasing network efficiency. Urban Transport Management Centre (UTCM) - variable message signs to direct car drivers to city centre car parks with available capacity, real time

information for public transport users via mobile phones and at stop/station signs, also journey time management system via bluetooth. Also interactive TIPs to access the data

- Strategic Highways Improvements: Enhancements to the key junctions on the Worcester Southern Link Road, to improve traffic flow, particularly at peak times and reduce transport costs to businesses and road users. Including dualling of the carriageway to Ketch Island from the motorway.
- Improved infrastructure for walking and cycling: improvements to passenger facilities to Worcester Foregate Street station including upgrading of the waiting area, signage, information, shelters, lighting and security at ground level; also Connect2 riverside – Diglis – new pedestrian and cycle footbridge over the river; also pedestrian routes from City Walls Road and Windsor row – footbridge and lighting improvements
- Improved public realm - High Street, Angel Square, Cathedral Square, Broad Street
- Funding in place for the construction of a new Railway Station (Worcestershire Parkway Regional Interchange) in Norton – connecting Worcester with the Birmingham - Bristol main line.

LTP 4 2017-2030 – currently undergoing public consultation.

- Overall aims to incentivise greater use and improvement to the perception of sustainable modes of transport (walking, cycling, passenger transport), to reduce congestion and improve air quality.
- Strategic Highway Improvements including the dualling of the Southern Link Road to include Carrington Bridge, and improvements to M5 Junction 6 to increase capacity and improve safety.
- Worcester City Centre Transport Strategy – the details of this is to be agreed between the County Council and City Council in 2017 - this document will set out plans to give more travel choices, reduce congestion and improve air quality in the city centre. Also public realm enhancements.
- Investment in identified key traffic corridors in the city to improve transport infrastructure so as to enable those corridors to provide improved journey times and reduced congestion – investment which could include new technology (signals/signing), surfacing, lighting, enhanced walking/cycling infrastructure.
- A comprehensive review of key road junctions in the city in terms of capacity, traffic flows, design and signalling apparatus (where provided) to identify whether capacity and/or safety improvements are required at those junctions, with improvement plans developed and implemented where necessary.
- Delivering Worcestershire Parkway mainline rail station in Norton.
- Delivering improvement schemes for Foregate Street Rail Station and Shrub Hill Rail Station, and other main railway improvements.
- Continued investment in Transport Telematics (including Variable Message Signs, Real Time Information System displays, Traffic Signalling Improvements and Traffic Monitoring and Information Dissemination Devices).
- Development of Active Travel Corridors linking Worcester with Malvern, Droitwich, Kempsey and Hallow, Worcestershire Parkway to Lower Broadheath via Worcester city centre, also Worcester River Severn Corridor (Sabrina Bridge to Kepax) and Worcester Canal Towpath (Diglis to Tibberton).
- Development of rail based park and ride at new local railway stations in Fernhill Heath to north of city and Rushwick to the west.

Appendix 14 – Competitor/Comparator Analysis (Cheltenham, Stratford upon Avon, Gloucester, Lincoln and Winchester)

As part of the Tourism Strategy research, a competitive analysis was undertaken to compare Worcester with neighbouring destinations and other UK heritage cities including, Cheltenham, Stratford upon Avon, Gloucester, Lincoln and Winchester.

- Towns and cities receive significant tourism investment from the public and private sector to ensure the tourism product remains attractive to visitors
- A quality visitor experience is provided including good visitor infrastructure (transport, public realm, toilets), quality hotels, restaurants, shops, as well as offering unique attractions
- The festival programme is strategically coordinated to ensure a quality event programme throughout the year
- There are dedicated town/city tourism websites and tourism marketing literature enabling visitors and residents to find out about the tourism offer
- Each of the towns and cities benefited from partnership's between the public sector, the Destination Management Organisation and the Business Improvement District
- Heritage assets are well-maintained and promoted
- Each town and city has a unique offer which is effectively promoted

Cheltenham Overview

The regency town of Cheltenham is located 25 miles away in the neighbouring county of Gloucestershire. Cheltenham is an elegant town, where much of the regency, architectural and heritage features can still be seen today.

The town offers a quality visitor experience with a range of quality accommodation, restaurants and entertainment provision. There are modern developments like the Brewery Quarter, where old meets new; home to branded stores, a multi-screen cinema, bowling alley and bars offering live gigs and entertainment throughout the week.

Cheltenham is famous for its horse racing events, particularly the Cheltenham Gold Cup, but the town also hosts a whole plethora of other high quality events including Cheltenham Jazz Festival, Cheltenham Science Festival, Cheltenham Music Festival, Cheltenham Literature Festival and the Cheltenham Food and Drink Festival. New events are added to the calendar on a regular basis, including a new Cheltenham Gin Festival in 2016.

Cheltenham is also known for its excellent High Street shops and independent shopping quarters, and in 2017, John Lewis will be opening a flagship store in the former Beechwood Centre. Montpellier is famous for its boutique shopping and fine dining experiences. The town has a huge array of quality accommodation options, including many four and five star hotels, as well as a selection of boutique hotel options.

Destination Management

Visit Cheltenham promotes the town using www.visitcheltenham.com as its main promotional tool. A tourism consultant has recently been appointed to investigate into the scope of future marketing and promotional activities, destination management, and the funding streams available for the organisation. Visit Cheltenham receives funding from Cheltenham Borough Council and through businesses advertising on the website. Cotswolds Tourism, the Destination Management Organisation for the region actively promotes the Cotswolds and includes Cheltenham in its marketing activities.

Town Centre Management

In April 2016, a Business Improvement District was set up, with a vision to make Cheltenham a vibrant and prosperous town where businesses flourish and visitor numbers increase.

Stratford upon Avon

Overview

Stratford upon Avon is located 25 miles away in the neighbouring county of Warwickshire. The town is internationally renowned for being home to the world famous Royal Shakespeare Company and the Shakespearean houses: five beautifully preserved Tudor homes and gardens which are all directly linked with William Shakespeare and his family.

In the heart of England and surrounded by glorious countryside, Stratford-upon-Avon is a quintessentially pretty English town and a stroll through the streets lined with historic buildings and the River Avon runs through the heart of this historic town. The town is listed as an official English Heritage City.

The town is well-known for the huge amount of quality restaurants, and exceptional accommodation establishments, many of which, are four and five star hotels.

Destination Management

Shakespeare's England is the Destination Management Organisation (DMO) responsible for the marketing and promotion of Stratford upon Avon, alongside Warwick, Kenilworth and Leamington Spa. The DMO receives extensive funding from Stratford upon Avon District Council, Warwick District Council, Warwickshire county Council, Warwickshire Local Enterprise Partnership plus income from the Shakespeare's England membership scheme. This level of public and private sector funding allows Stratford upon Avon to be promoted internationally across various media. Stratford upon Avon District Council also promotes the town via the Visit Stratford website.

Town Centre Management

The Stratford upon Avon Business Improvement District, Stratforward was set up in April 2009, with the main objectives being: to deliver a comprehensive marketing strategy; to increase and develop events and festivals; operate the Town Host programme; introduce new street entertainment, as well as offering a range of business support initiatives.

Gloucester Overview

Gloucester is located 28 miles south of Worcester. The City is positioned on the River Severn with the Cotswolds to the east, the Forest of Dean to the west and the Malvern Hills to the north. The City has over 2,000 years of history dating back to the Roman times, as well as a well-preserved Victorian port and historic docks with good quality bars and restaurants.

Attractions in the City include the historic Cathedral, many medieval and Tudor gabled and half timbered houses, numerous churches and minor remains of monasteries and priories. Gloucester also hosts festivals and events at local, national and international level, a distinguished example being the Three Choirs Festival. Sports-wise the city is home of Gloucester RFC, one of the world's top rugby union clubs, while Bentham Domes boasts one of Europe's largest 5-a-side leagues. The City has a variety of accommodation providers with a small selection of 4 star hotels.

Destination Management

Marketing Gloucester works alongside Gloucester City Council, GFirst Local Enterprise Partnership and Gloucestershire County Council. The organisation is responsible for promoting the City as a great place to live, work, study, visit and invest; locally, nationally and internationally. Marketing Gloucester also organises award-winning events and festivals, engages with a variety of businesses and investors, and also implements programmes to develop pride of place amongst residents. Marketing Gloucester is mainly funded by Gloucester City Council, with additional revenue streams from external grants.

Town Centre Management

Gloucester City Council is currently responsible for town centre management, however the City Council and Marketing Gloucester are currently working together to set up a Business Improvement District.

Lincoln Overview

Lincoln is a historic City located in the East Midlands. In 1068 William the Conqueror arrived in the ruined city and ordered the building of Lincoln Castle and later Lincoln Cathedral. The gothic Cathedral is home to one of the four surviving copies of Magna Carta, and benefited from international promotion in 2015 surrounding the 800th anniversary of Magna Carta. The City is an official English Heritage City.

The City has a variety of independent and High Street retailers, entertainment venues, museums and art galleries, as well as many parks and open spaces. The City has a variety of high quality accommodation providers, with a range of 4 star options.

Destination Management

Visit Lincoln is a public/private sector destination management organisation with the remit of driving growth in the Visitor Economy across Lincoln and Central Lincolnshire. The Partnership established in 2011, is a part of the Lincolnshire Chamber of Commerce and based in the offices of the Lincoln Business Improvement District. Visit Lincoln generates income from private sector partners to deliver marketing and destination management on behalf of businesses in the region.

Founding members and local authority funding partners include Lincolnshire Chamber of Commerce, Lincoln Business Improvement Group, City of Lincoln Council, North Kesteven & West Lindsey District Councils.

The Visit Lincoln Partnership is the official Destination Management Organisation for Lincoln and the surrounding area. The Partnership includes public, private and third sector organisations, with the aim to raise awareness of Lincoln as a great place to visit, study, meet and invest. The Visit Lincoln vision is to create a flourishing and sustainable visitor economy, maximising the contribution of the sector to economic prosperity, employment and quality of life. Visit Lincoln has a superior website, which promotes the City very well indeed.

There is also Visit Lincolnshire which is managed by the Lincoln Chamber of Commerce, which manages the Visit Lincolnshire website promoting the City and the wider county.

Town Centre Management

Lincoln BIG is the Business Improvement District for the City, and aims to put Lincoln on the map as a retail and tourist destination. Lincoln BIG aims to improve the experience in the City Centre for those who visit, live and work in the City.

Winchester Overview

Winchester is located in Hampshire, and was the former capital of England during the time of King Alfred the Great. The City is packed with historic buildings, monuments, museums with great sightseeing opportunities. There is a choice of top end hotels, good restaurants and a high quality shopping experience, with boutique and independent retailers.

Destination Management

The lead body for destination marketing and champion of the tourist industry in the Winchester district is the 'Visit Winchester and the Heart of Hampshire Destination Management Partnership' (DMO), which is a membership organisation supported by private sector and public sector involvement from Winchester City Council, Tourism South East, East Hampshire District Council, the South Downs National Park and tourism business in the Winchester District and the East Hampshire area of the South Downs National Park. The Destination Management Plan aims to develop and maintain the successful provision of industry support and marketing opportunities for Winchester and the Hampshire area of the South Downs.

The Partnership is led by Winchester City Council who operates the Visit Winchester website. There is also the Visit Hampshire website which is operated by Hampshire County Council which includes Winchester.

Town Centre Management

There is a Winchester Business Improvement District whose vision is to develop a vibrant, exciting and successful business community; an attractive, clean and safe destination for customers and clients, shoppers and staff, residents and visitors; making Winchester a profitable place in which to do business.