

Stronger City Economy Scrutiny Panel

6 October 2015

Time 6.00 pm **Public Meeting?** YES **Type of meeting** Scrutiny
Venue Committee Room 3 - Civic Centre, St Peter's Square, Wolverhampton WV1 1SH

Membership

Chair Cllr Jacqueline Sweetman (Lab)
Vice-chair Cllr Jonathan Yardley (Con)

Labour	Conservative	Liberal Democrat
Cllr Harman Banger Cllr Philip Bateman Cllr Payal Bedi Cllr Val Evans Cllr Welcome Koussoukama Cllr John Rowley Cllr Tersaim Singh Cllr Martin Waite Cllr Daniel Warren	Cllr Paul Singh	

Quorum for this meeting is three Councillors.

Information for the Public

If you have any queries about this meeting, please contact the democratic support team:

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Agenda

Part 1 – items open to the press and public

<i>Item No.</i>	<i>Title</i>
1	Apologies
2	Declarations of Interest
3	Visitor Economy (Pages 1 - 84) [To provide an overview of activity to support the development of the visitor economy.]

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Stronger City Economy Scrutiny Panel

6 October 2015

Report title	Visitor Economy	
Cabinet member with lead responsibility	Councillor John Reynolds City Economy	
Wards affected	All	
Accountable director	Keren Jones, City Economy	
Originating service	City Economy	
Accountable employee(s)	Mark Blackstock	Head of Visitor Economy
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Report to be/has been considered by		

Recommendation(s) for action or decision:

The Scrutiny Board is recommended to endorse the approach to developing Wolverhampton's visitor economy.

1.0 Purpose

- 1.1 The purpose of this report is to provide an overview of activity to support the development of the visitor economy. This includes activities to obtain a better understanding of our markets, outlining our offer and what we are doing to improve the offer to visitors to the city.

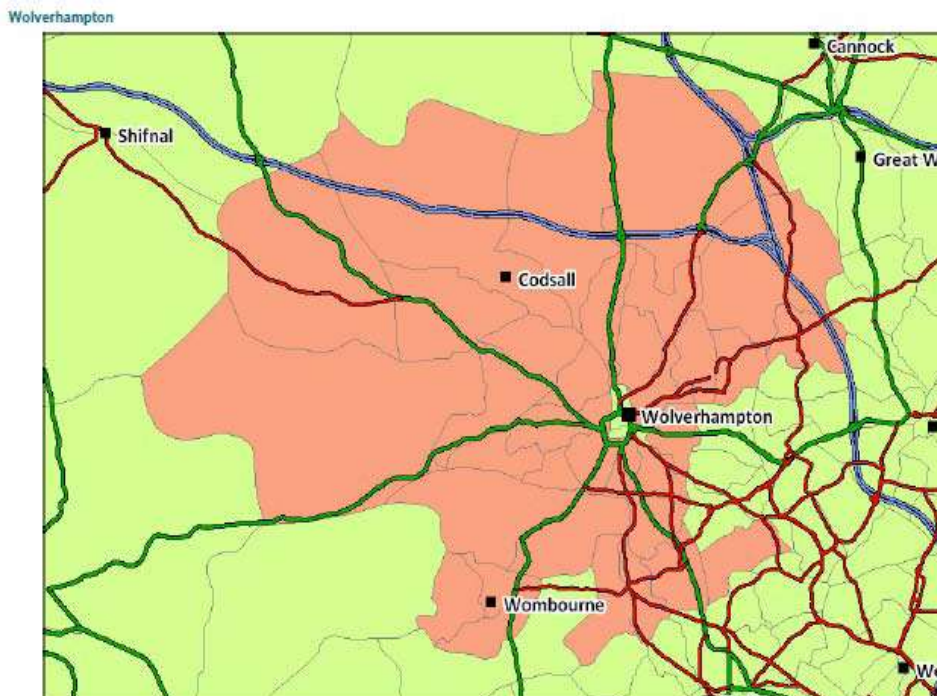
2.0 Background

- 2.1 A key Council corporate priority is to develop a vibrant city, in recognition that to attract and retain high value businesses and a skilled workforce, the city needs to develop a distinct and attractive offer. This includes developing places that support creative and learning sectors to flourish, generate vibrancy, footfall and in turn stimulate the retail sector. The provision of an excellent cultural offer is an essential part of ensuring we have a strong visitor economy. Our heritage and leisure facilities support improved footfall and the economic development of our city.
- 2.1.1 Direct actions relating to this corporate priority include:
1. Enhance and expand our city marketing approach with partners to raise our external profile and attract new investment into the city;
 2. Begin the £10 million refurbishment of the Civic Halls complex to enhance its national position;
 3. Commence implementation of £10.9 million programme to deliver new housing, retail, culture and leisure improvements in Bilston Urban Village.
- 2.1.2 Together with capturing indirect benefits from major development schemes include:
4. Enable development of the Springfield Brewery site for specialist vocational and educational provision as part of creating a thriving canalside quarter (thus bringing new footfall into the city centre);
 5. Start construction on key city centre schemes such as the Wolverhampton Interchange and progress key opportunities at Westside and Southside (also brings its new footfall into the city centre);
- 2.2 Placed within the City Economy Service, the Visitor Economy team was formed in March 2015 to draw together, develop, market and publicise Wolverhampton's Offer. The team work closely with other parts of City Economy, namely, City Development, Enterprise and Skills.
- 2.3 The relevant performance measures relating to developing a vibrant city are: number of businesses located in the city centre, number of jobs created in the city centre and number of visitors to the city's main cultural venues. Appendix 1 outlines the baseline position in terms of visitor economy related statistics centred around the city centre.

3.0 Understanding our markets

- 3.1 The following section aims to provide an overview of our visitor markets in terms of where they come from and what type of offer they are looking for the city to provide:

3.2 Shoppers: Wolverhampton has a number of retail centres including the City Centre, Bilston and Wednesfield town centres, local district centres and a number of retail parks. According to Wolverhampton City Centre review (2013), the City Centre has a catchment area of 439,612 spreading into South Staffordshire (see map below), however currently only attracts 23% of its catchment (Wolverhampton City Centre review 2013). The centre is 69th out of 4,500 centres benchmarked against ones of similar size, characteristics & demographics (source Springboard). Wolverhampton performs well in comparison to medium sized towns but underperforms in fashion, food and tourism (source Springboard). In terms of the number of units, it performs better than comparators for all types except for department stores, however planned improvements over the next two years should help to address this. The Mander and Wulfrun shopping centres, in the city centre, currently attract over 26 million visitors each year. Refurbishment and expansion plans for the Mander Centre will cement Wolverhampton's position as a key regional shopping destination.



3.3 Cultural Visitors: Wolverhampton has a strong cultural, leisure and entertainment offer, with the Civic Halls, Grand Theatre and City of Wolverhampton Art Gallery providing the largest cultural offer within the Black Country, attracting visitors from across the West Midlands and beyond (appendix 2: map showing the UK ticketed audience for the Civic and Wulfrun Halls in 2011). The city's wealth of cultural venues and events brings in over 1 million visitors each year. Together, they have a local economic impact of £17.3 million supporting 637 jobs locally.

3.3.1 More broadly, Wolverhampton's visitor offer consists of a mix of private and publicly run leisure centres, cinema screens, listed buildings, scheduled monuments, conservation areas, green spaces, nature reserves and country parks. Other key attractions include the Lighthouse Media Arts Cinema, sporting facilities such as Wolverhampton Football Club, Greyhounds racing, Wolverhampton Racecourse and heritage including Wightwick

Manor, Bantock House and Bilston Craft Gallery. Leisure facilities not only serve local residents, Aldersley Leisure Village has outdoor and stadium facilities of regional and national significance hosting regional events including West Midlands Regional Shooting Centre, Midlands League Cross Country and national events, including the National Dwarf Games.

3.3.2 Increasingly, visitors to the city are demanding more good quality hotels, fine food and strong transport links are key to destination decision making. The City of Wolverhampton Council has commissioned a study to assess the current and future accommodation offer. In addition to this, the importance of the secondary offer is becoming more and more apparent, with visitors aiming to pack as much into their time in the area as possible. Our aim is to make Wolverhampton more appealing and competitive, so that visitors spend their time and money in the city.

3.4 **Students:** The University has a significant student population of 23,000 students including international students and presents its facilities as an attractive Campus offer. The University also has established a Brussels office to raise its profile globally. Although this audience has limited disposable income, they tend to have lots of free time so require a broad range of good value activities. Wolverhampton has a higher proportion of stay at home students than other cities.

3.5 **Businesses, Developers and Investors:** there are 1466 businesses in the city centre employing a large workforce who can contribute to the vibrancy of the city in terms of generating footfall. The city's offer is crucial to attract investors, high value businesses and workforce. A recent business conferencing study has highlighted opportunities for niche conferencing opportunities.

4.0 **Details of Wolverhampton's Current Visitor Offer**

4.1 For the purpose of outlining Wolverhampton's visitor economy offer, the following section has been split the offer into three defined areas: Central, East and West, reflecting their distinctive characteristics.

4.3 **Wolverhampton Central**

4.3.1 Wolverhampton City Centre is a key area for **retail** in the Black Country, with a turnover of around £535 million. The City Centre has around 1.8 million square feet of commercial space of which one million square feet is retail and the remainder leisure, restaurants, pubs, hotels and offices. There are around 700 shops of which around half are independents and there is a long established market that operates four days a week. Around 30% of the total retail floor space is accounted for by the town's two managed shopping centres, the Wulfrun Centre and the Mander Centre. Refurbishment and expansion plans for the Mander Centre will cement Wolverhampton's position as a key regional shopping destination. On the outskirts of the City Centre there are 3 major retail parks Bentley Bridge being the largest, St Johns and Mitre Retail Park. There are also three main supermarkets: Asda, Sainsburys and Waitrose. Major development schemes will enhance footfall and the visitor experience, including Interchange, Westside and Southside developments, expansion of the further and higher Education estate, mixed development and the Canalside Quarter.

- 4.3.2** Occupiers in Wolverhampton City Centre have successfully voted for Business Improvement District (BID). Wolverhampton BID will drive investment in the City Centre and give local businesses a greater say in the way it is marketed, maintained and managed delivering £3 million of investment in the area over the next five years. The BID has appointed a number of City Ambassadors who will be a recognisable presence in the city centre and champion the city centre on a daily basis to both businesses and visitors alike. They interact with BID business members to inform them of BID projects ranging from how the BID can save the businesses money, through to ensuring they know about BID events, to respond to businesses concerns and to assist in resolving any city centre operational issues. They are also a walking talking tourist information service and a friendly and welcoming point of contact for any visitors to the city centre.
- 4.3.3** Wolverhampton's principle **cultural** offer is in the City Centre comprising of Wolverhampton Grand Theatre, Wolverhampton Civic, Wulfrun Hall and Slade Rooms, attracting visitors from across the UK. Wolverhampton Civic Halls provide the largest entertainment, events and leisure venue in the Black Country and is a major hub for live entertainment attracting some of the biggest names in pop and rock and top comedians. Wolverhampton Grand Theatre offers a wide range of major touring productions including drama, musicals, ballet, dance, opera, variety, concerts, children's shows and one of the biggest pantomimes in the UK. Together, they have a local economic impact of £17.3 million supporting 637 jobs. The venues have recently secured £6.6 million through the Black Country Local Enterprise Growth Deal to support major refurbishment and improvement of the Civic Halls and the Grand Theatre.
- 4.3.3** The City of Wolverhampton Council's two main arts and heritage venues in the city centre offer a range of activities from exploring 300 years of art at City of Wolverhampton Art Gallery, or finding out more about the city's rich history at City of Wolverhampton Archives. The City of Wolverhampton Art Gallery is a Grade II* listed building, an extension to which was built in 2007 which included a dedicated Pop Art gallery and additional space for special exhibitions. The Gallery is one of the few Arts Council England National Portfolio Holders organisations.
- 4.3.4** **Light House Media Centre** is the Black Country's only independent cinema, housing two screens, three galleries and a café bar within the iconic Victorian architecture of The Chubb Buildings.
- 4.3.5** **Wolverhampton Wanderers Football Club**: an internationally recognisable brand, are in the early throes of a £40m revamp of Molineux football stadium, taking capacity from just under 30,000 to 50,000. One new stand is now complete, including new ticket office and shop facilities. The new stand is also home to their museum.
- 4.4** **Wolverhampton West**
- 4.4.1** Wolverhampton is a green city boasting 12 city parks and national awards such as Green Flag Award for St Peter's Gardens and Green Heritage Site nominations for West and Bantock Parks. National Trust properties include Wightwick Manor and Moseley Old Hall. The pretty village of Tettenhall is one of the most desirable places to live in the West Midlands. Bantock House, set within 43 acres of parkland and surrounded by

delightful formal gardens, allows visitors to explore the history of Wolverhampton and its people in the period settings of the former Bantock family home.

4.4.2 Wolverhampton Racecourse is located less than two miles north of the City Centre. It was Britain's first floodlit horse racing track, the first to race on a Tapeta surface and offers racing day and night. Wolverhampton offers one of only two sites across the country operating in all weathers to service the gambling market worldwide, spreading the city's name across the 100's of countries. Set in 22 acres of beautiful parkland, Wolverhampton Racecourse has a renowned reputation for year round racing and fantastic live entertainment, with easy access to the racecourse from across the country. It is the UK's busiest racetrack hosting almost 100 fixtures in 2015.

4.4.3 Aldersley Leisure Village, one of WV Active run leisure centres, hosts a number of regional and national events, helping to raise the areas profile.

4.4.4 Green and blue infrastructure: the city is proud of its many miles of canals which run through stunning scenery, all of which bring a better quality of life for residents and a welcoming experience for visitors. Smestow Valley Local Nature Reserve offers a haven for wildlife within its meadows and 15 acres of woodlands. Created in 1881, the city's West Park is a fine example of a Victorian park and is known as the 'People's Park'. Its 17 hectares includes a lake and a beautifully landscaped green space within a ten-minute walk of Wolverhampton City Centre.

4.5 Wolverhampton East

4.5.1 Bilston town centre also house a number of **retail** premises. Bilston town centre recently voted for a Business Improvement District (BID) which aims to generate £500,000 investment in the town over the next five years. Town centre marketing, parking, more CCTV and cleaner street are amongst their priorities.

4.5.2 Bilston Craft Gallery's offer is about inclusion and skills development, particularly in arts and crafts. The gallery has a successful Craftplay programme, which provides activities for children under seven. It also has a locally relevant programme of temporary exhibitions.

4.5.3 With an historic charm, **Bilston Town Hall** is a beautiful Grade II Listed venue that brings elegance to any celebration. It provides stylish and flexible rooms in a unique wedding venue that is attractive for wedding receptions, civil ceremonies, parties, conferences and performances. Housed in Bilston Town Hall, Gazebo Theatre launched in 1979 and has since been producing ground breaking theatre to audiences across the UK. The Robin 2 is a 700 capacity live concert venue in Bilston.

4.6 Visitor week

4.6.1 Held for the first time from 6 to 12 July 2015, provided a platform for showcasing Wolverhampton's 'offer' and providing opportunities to support businesses involved in the visitor economy. The showcasing strand programme consisted of over 30 events including activities aimed at young people, guided venue tours and jobs support and

information opportunities events. Strand two consisted of workshops for businesses involved in the visitor economy, three days of targeted activity to support entry into new markets – Conference and Meetings Trade Show in London. An evaluation is provided in Appendix 3.

5.0 Improving our visitor offer

5.1 The following sections outline our activities to improve the offer to make our city more attractive to businesses, residents and visitors.

5.2 **City Centre regeneration:** If the City is to reach its potential and compete for investment on a national and international scale, it is important that the quality of the City Centre environment is attractive to businesses, residents and visitors. The City Council launched the City Centre Prospectus in July 2012, following significant developer, business and investor consultation, setting out a regeneration strategy that identified a number of strategic projects to be bought forward by both the Council and with wider partners.

5.2.1 The City Centre Connected Places project aims to improve **public realm** within the City Centre in recognition of its impact on the future enjoyment, attraction and economic viability of the City as reflected by recent engagement with potential investors. The Connected Places project incorporates design, implementation, management and maintenance of new and improved public spaces within the City Centre, creating improved connectivity between strategic developments whilst improving safety and security and integrating with new and improved car parking.

5.2.2 Early phases of public realm improvements were delivered as part of the Transport and Public Realm Improvements Works Programme to improve connection from Interchange to the retail core. The works, which are still ongoing, involve the improvement of the highway and footway in Queen Street, Princess Street, Market Street and Garrick Street. New public space has been created that will provide the potential to bring together new business uses into the City Centre.

5.2.3 Some of the City's most significant sites that generate footfall are situated outside of the Ring Road e.g. the University Molineux Campus and football ground. Similarly some of the major regeneration opportunities are outside of the ring road and include Interchange, Royal Hospital site and Canalside, the latter includes the site of Springfield Brewery and the proposal for a major new education and training hub. Later phases will include the Molineux Quarter Masterplan making the area more pedestrian friendly, re-consider the car-parking arrangements as part of the City Centre car parking strategy and improve links to the core of the City Centre. The second priority workstream has been identified due to the need to improve the pedestrian links from Interchange to Springfield Brewery.

5.2.4 The **Canal Side Quarter** (CSQ) is a key road, canal and rail gateway into the city centre, comprising some 47 hectares (116 acres) of land and buildings just outside the ring road. The canal is a unique asset for the city and presents the potential for attracting a range of new economic uses that will bring a fresh dimension to the City's offer that include elements that can improve the quality of life for business, residents and visitors to the city. Canalside presents a unique opportunity in the City that has a scale to deliver truly

transformational comprehensive regeneration and growth. Its proximity to the city centre and its location on the West Coast Rail line makes the CSQ highly visible to people travelling into and through the city by train but currently it does not present a positive view of the city. It is a “window “on the City and its regeneration provides an opportunity for the City to change its image and perception to visitors.

- 5.2.5 Significant progress has been made on the delivery of key regeneration sites adjacent to the CSQ area. **Wolverhampton Interchange** is progressing with the construction of i10 underway. In addition, work is due to start on the upgrade of the towpath surface and consideration of selective lighting as part of a citywide walking and cycling network. The decontamination of the Council’s land at Horsley Field’s by Dunton Environmental has started on site.
- 5.2.6 The University has acquired the former **Springfield** Brewery site to develop an education and training hub which will see the development of a West Midlands UTC and potentially the Elite Manufacturing Centre. Work has started on site and is highly visible from the railway line following the removal of shrubbery. It is sending a powerful message about the regeneration of the area. Once developed it will accommodate circa 5000 learners and teachers. Therefore the University is keen to improve pedestrian links between Interchange and the Springfield Brewery site linked into the wider connected spaces strategy outlined above. Demolition of Steam Mill will start on site in September and the extension of the Multi-Storey car park will commence in January 2016. The Interchange is critically important to the wider City Centre regeneration.
- 5.2.7 The **City Centre Car Parking Strategy** seeks to provide an evidence based assessment of the changing car parking requirements that will result from the regeneration of the City. It will be used to determine the location, quantum and type of car parking required in future as the regeneration of the City Centre takes place. The City Centre car parking strategy will need to integrate with this wider connected places strategy work. The Strategy is due to be completed by December 2015.
- 5.3 **Hotels and hotel study:** the Council and key partners, including Wolverhampton Business Champions, recognise that hotel provision is a key component of future growth. Within Wolverhampton, there is perceived to be a shortfall in quality hotel provision that supports this stronger economy. Although occupancy tends to be good during the week, they are poor during the weekend. A study has been commissioned to explore demand and supply for hotel space in Wolverhampton together with the parameters required to deliver additional hotel space that supports the needs of the city’s growing economy. The findings of this study will be used to support the city’s priority regeneration projects by attracting further hotel market interest from investors, developers and operators.
- 5.4 **Business Conferencing:** a report on the potential for business conference and exhibition markets in Wolverhampton (March 2015) explored the potential for boosting the visitor economy in Wolverhampton from conference and business tourism markets. This study concluded that there were opportunities for further development of conference tourism in Wolverhampton from the academic sector (associated with the University of Wolverhampton), associations (particularly related to medical specialisms) and from the area’s corporate sector (with its specialisms in advanced manufacturing). However, it faces a number of challenges relating to the retail offer, accommodation, awareness and

desire to use Wolverhampton is not high among conference organisers, and the Civic Halls require additional investment to bring them to an appropriate standard for conference use. However it highlighted the potential of the Grand Theatre, Art Gallery and Arena Theatre for business conferencing. It concluded that Wolverhampton had opportunities but also faces a number of challenges if it is to attract conference business and that Wolverhampton should on facility, developments, marketing activity and service priorities

- 5.5 **City of Wolverhampton Councils owned venues:** the visitor economy team has responsibility for the Civic Hall, Wulfrun Hall, Slade Rooms, City of Wolverhampton Art Gallery, Bantock House, City of Wolverhampton Archives, Bilston Craft Gallery, events and tourism. More recently, responsibility for parks events and marketing has been transferred. An initial overhaul of publicity is now being followed up by careful marketing and development of the offer. With some aspects still under review, the improvements are expected to offer increased secondary spend and hire income, increased attendances, raise impressions of the city, change opening hours in order to make services more accessible at key times. Sustainability through correct commercialisation of services is key to the success of this activity. The Council also operates Bilston Town Hall, and supports the Grand Theatre, Light House Media Centre, Gazebo and Newhampton Arts Centre.
- 5.6 **Complementary Visitor offer:** other organisations also contribute to the city's offer, for example, Arena Theatre, pubs and clubs, Dunstall Racecourse, Monmore Stadium Greyhound Racetrack, Molineux Football Stadium and Wolverhampton Speedway. Hotels, restaurants, cafes and transport links also support the visitor offer.
- 5.7 **Marketing and Publicity:** The existing Civic Halls publicity plan has now been rolled out to the greater visitor economy group, resulting in improvements in exposure and attendance. Work is underway to develop a visitor website, with content provided by the visitor economy team. In addition, the visitor economy team and corporate communications team are working to deliver positive messages through a range of channels including social media, press coverage and campaigns on the ground. Future marketing activity, which to date has targeted local markets, will be on a regional level to actively fight for position regionally. Where appropriate, we will work together with our neighbours to attract product and audiences. We are also watching the market for new developments. For example, a recent example in Stockholm showed that wifi based marketing activity at events allowed the organisers to capture the audience and steer it, taking advantage of swarm mentality.
- 6.0 **Financial implications**
- 6.1 There are no direct financial implications from this report. All initiatives are covered within existing capital and revenue budgets and Councillor approval has been sought in separate reports where required. Detailed five year business plans are being produced for each cultural venue managed by the Council. [ES/22092015/X]
- 7.0 **Legal implications**

7.1 There are no legal implications from this report. RB/25092015/O

8.0 Equalities implications

8.1 Equalities are taken into account as part of developing the visitor economy in terms of ensuring some activities are free and others are charged for.

9.0 Environmental implications

9.1 Wolverhampton's green and blue infrastructure (green spaces and canals) are important in attracting visitors.

10.0 Human resources implications

10.1 Further restructure is necessary to meet challenging expenditure targets in venues.

11.0 Corporate landlord implications

11.1 Corporate landlord is responsible for several of the venues outlined in this report. Improvements need to be made to venues to contribute to their sustainability, for example through the Civic Halls Improvement Programme. Other venues are also experiencing pressures.

10.0 Schedule of background papers

1. City Centre AAP Statistics Sheet
2. Map showing the UK ticketed audience for the Civic & Wulfrun Halls in 2011
3. Visitor week evaluation
4. Black Country Visitor Economy Strategy

Appendix 3: Visitor Week

Background information:

- The third week of the City Board sponsored programme was held from 6 – 12 July, it consisted of two strands of work, one focused on providing a platform for showcasing Wolverhampton's 'offer' and the other on providing opportunities to support businesses involved in the visitor economy.
- The showcasing strand programme consisted of over 30 events, joint in events for everyone and activities aimed at young people, guided venue tours, and several jobs support and information opportunities events.
- Strand two consisted of workshops for businesses involved in the visitor economy, three days of targeted activity to support entry into new markets – Conference and Meetings Trade Show in London

Analysis of the Week:

- Variety of programme consisted of 33 events focussed on targeted groups
- Promotion and communication of the programme achieved at no cost largely via www.wolverhampton.gov.uk/visitorweek and social media, hashtag and Facebook
- Overall promotion of Wolverhampton's offer supported though links the Attractions Guide. Careful consideration is needed about collateral for future.
- Partner involvement needs developing further improve how we showcase Wolverhampton's offer
- Press coverage was extensive on radio and was Express and Star covered the programme but more could be achieved
- Perception survey feedback points to residents having issues with car parking, lack of restaurants and venues for people over 40 in the city centre
- Volunteers recruitment rallying call has proved fruitful
- Visitor profile change at venues can be achieved through the right product as shown by the Engineering Celebration Day at Bantock. Not only did it provided record breaking numbers of visitors to the museum but also brought a new audience to the complex
- Relationships, support and engagement with Visitor Economy businesses needs developing further
- Trade Show attendance has been yielded a positive response. This requires capacity and the skill base to coordinate selling the city in the conference market and delivering to a high standard. Wolverhampton has appeared in an article in Conference and Trade News magazine.
- Stakeholder workshops yielded potential to develop a conference and events network supported by the Black Country Hoteliers Group, tailor the scope of their free professional training programme and for members to provide peer to peer training.

The **overall learning** is that we need to better understand consumer behaviours and develop relationships with wider businesses involved in the Visitor Economy so that not only can we support improvement of the city's overall offer but also raise awareness amongst this group of the regeneration and wider opportunities in the city. There is scope to develop Visitor Week, willingness of partners to be involved but this needs careful handling and facilitated by early. Attendance at a number of trade shows over the year have proven worthwhile

and decisions now need to be taken about how the city and individual venues continue to position and promote themselves in the market place.

City Centre Statistics						
Category	AAP		Ring Road			
Number of businesses ₁₀	Retail		Number	Percentage (%)		
	Office/Commercial			45		
	Food & Drink			35		
	Leisure			10		
	Other			5		
	Total		1466		5	
Sectors ₈		Number of Jobs	Percent of total	Number of jobs	Percent of total	
	C : Manufacturing	2600	7.4	1300	4.2	
	E : Water supply; sewerage, waste mgmt, remediation activities	100	0.3	100	0.3	
	F : Construction	1800	5.1	1700	5.6	
	G : Wholesale and retail trade; repair of motor vehicles / motorcycles	4100	11.7	3300	10.8	
	H : Transportation and storage	500	1.4	400	1.3	
	I : Accommodation and food service activities	1400	4.0	1200	3.9	
	J : Information and communication	800	2.3	800	2.6	
	K : Financial and insurance activities	700	2.0	600	2.0	
	L : Real estate activities	300	0.9	200	0.7	
	M : Professional, scientific and technical activities	1700	4.8	1400	4.6	
	N : Administrative and support service activities	5200	14.8	5000	16.3	
	O : Public administration and defence; compulsory social security	5900	16.8	5900	19.3	
	P : Education	5900	16.8	5900	19.3	
	Q : Human health and social work activities	2500	7.1	1500	4.9	
R : Arts, entertainment and recreation	800	2.3	600	2.0		
S : Other service activities	800	2.3	700	2.3		
Total	35100	100	30600	100		
Vacancy rates (%), (by use)	Retail		W'ton (%)	UK average (%)		
	Office ₁₃		23.4	12.6		
Retail/office space ₁		Floorspace (sqm)	W'ton / UK %	Floorspace (sqm)	W'ton / UK %	
	Convenience			14610	10 / 17.9	
	Comparison			72320	49.6 / 45.9	
	Services			31160	21.4 / 24.5	
	Vacant			25250	17.3 / 10.6	
	Miscellaneous Office ₁₃			2560	1.8 / 1.0	
Pedestrian flows ₁₁	Number of pedestrians per hour	Dudley St	Victoria Street	Darlington Street	Cleveland Street	
		5,364	2,018	961	946-792	
		2,006	2,008	2010	2012	
		Inbound	151,828	146,567	144,078	137,072
		Outbound	149,901	143,000	143,674	144,570
NET	1,927	3,567	404	-7,498		
Visitor numbers	Number	Civic Hall (2008)	Grand Theatre (2008)	W'ton Art Gallery (2008)	Mander/Wulfrun (2011)	
		469,074	297,957	147,493	26,487,976	
		Mander Centre	Wulfrun Centre	Merry Hill	Bullring	
		Average visits (per year) Primary catchment	52.0	41.6	11.3	12.4
		Average visits (per year) Secondary catchment	52.0	44.2	11.0	13.5
Average visits (per year) Tertiary catchment	31.0	25.4	14.4	13.6		
Average spend Primary catchment (£)	36.3	27.5	71.6	78.2		
Average spend Secondary catchment (£)	32.8	26.7	72.1	69.0		
Average spend Tertiary catchment (£)	38.6	21.1	69.4	74.4		
Shopping population and catchment areas ₁₅	Population	Primary	Secondary	Tertiary	Total	
		185,000	127,000	272,000	584,000	
		Shopper Population	118,000	57,000	35,000	210,000
	Penetration %	64	45	13	100	
	Demographics - Acorn Profile (GB Index = 1)	W'ton / UK %				
		Wealthy Achievers	67	78	80	19 / 25
		Urban Prosperity	32	37	20	3 / 12
		Comfortably Off	124	104	115	32 / 28
		Moderate Means	44	67	45	7 / 14
		Hard-Pressed	191	184	193	39 / 20
Supply and demand of property by sector ₁		Convenience Comparison Service	No. of requirements	Min/Max flrspc (sqm)	No. of requirements	Min/Max flrspc (sqm)
	8		2662 / 6550	25	7796 / 16179	
	20		14446 / 19862			
Office space supply and demand ₁₃	0-500 sqft 501-2500 sqft 2501-5000 sqft 5001-10000 sqft 10001-30000 sqft 30001-50000 sqft 50001+ sqft	% of Properties	% by Floorspace			
		5	0			
		56	9			
		18	8			
		10	9			
		14	30			
		4	20			
		3	24			
Indicative values / rents (£ per sqm) ₉	Mander Centre / Dudley Street Lichfield Street/Princess Street Waterloo Road/Darlington Street Cleveland Street	Retail A (£)	Retail B (£)	Retail C (£)	Office (£)	
		594 - 635	297 - 317.5		50 - 70	
		185 - 236	92.5 - 112.5		40	
		250	125	62.5	57 - 61.6	
		125	62.5		50	
Car Parking spaces available ₂	Off street	Off street	On street	Off street	On street	
		7400 ₃	1005	4416		
Residential properties - Type ₃	Whole House or Bungalow; Detached Whole House or Bungalow; Semi-Detached Whole House or Bungalow; Terraced (Including End-Terrace) Flat, Maisonette, Apartment; Purpose-Built Block of Flats or Tenement Flat, Maisonette, Apartment; Part Converted/Shared House (+Bed-Sits) Flat, Maisonette or Apartment; In Commercial Building Caravan or Other Mobile or Temporary Structure	Number	Percentage	Number	Percentage	
		323	7.7	44	3.2	
		796	19.0	116	8.5	
		916	21.9	259	19.1	
		1648	39.4	759	56.0	
		347	8.3	69	5.1	
		148	3.5	108	8.0	
		3	0.1	2	0.1	
		Total	4182	100	1357	100

City Centre Statistics					
Category	AAP		Ring Road		
Market trends in the City Centre property market	Increased interest in development opportunities in a range of sites and sales of new build housing.				
Economic trend / forecast info for City Centre	Retail	Retail occupancy slowly improving, distribution hubs near City Centre as supermarket competition increases. Agents have highlighted investment potential in the refurbished Mander Centre			
	Commercial	Agents have speculated given better office space, offers would be forthcoming. Interest in older office space being converted to residential.			
Residential properties - Tenure_s		Number	Percentage / W'ton	Number	Percentage / W'ton
	Owner occupied	1249	31.9 / 56.6	243	19.3 / 56.6
	Shared ownership	21	0.5 / 0.4	8	0.6 / 0.4
	Social rented - Council	793	20.3 / 22.3	303	24.0 / 22.3
	Social rented - other	638	16.3 / 5.7	221	17.5 / 5.7
	Private rented	1131	28.9 / 13.2	458	36.3 / 13.2
	Rent free	81	2.1 / 1.8	29	2.3 / 1.8
	Total	3912	100	1261	100
Households_s		Number	Percentage / W'ton	Number	Percentage / W'ton
	Couple only	415	10.6 / 13.0	150	11.9 / 13.0
	Lone parent + dependent children	327	8.3 / 9.4	102	8.1 / 9.4
	Other hhs + dependent children	618	15.8 / 21.8	136	10.8 / 21.8
	Hhs + non dependent children	296	7.6 / 11.6	63	5.0 / 11.6
	Multi person households over 65+	146	3.7 / 7.6	23	1.8 / 7.6
	Lone pensioner (65+)	419	10.7 / 12.9	107	8.5 / 12.9
	Student only	55	1.4 / 0.3	37	2.9 / 0.3
	All other lone person hhs	1352	34.6 / 19.3	541	42.9 / 19.3
	Other	285	7.3 / 4.0	103	8.1 / 4.0
	Total occupied households	3912	100	1262	100
Population_s		Number	Percentage / W'ton	Number	Percentage / W'ton
	0-4	614	6.3 / 6.7	189	5.5 / 6.7
	5-15	903	9.3 / 13.1	184	5.3 / 13.1
	16-24	2321	23.9 / 12.6	1473	42.6 / 12.6
	25-44	3012	31.0 / 27.8	1052	30.4 / 27.8
	45-59	1391	14.3 / 18.3	288	8.3 / 18.3
	60-74	848	8.7 / 13.5	161	4.6 / 13.5
	75+	623	6.4 / 8.0	110	3.2 / 8.0
	Total residents	9713	100	3457	100
Economic Activity_s		Number	Percentage / W'ton	Number	Percentage / W'ton
	Total no. of people aged 16-74	7572	100	2974	100
	Economically Active				
	Full-time employees	2178	28.8 / 35.5	658	22.1 / 35.5
	Part-time employees	719	9.5 / 13.5	192	6.5 / 13.5
	Self-employed	340	4.5 / 6.3	84	2.8 / 6.3
	Unemployed	728	9.6 / 7.8	235	7.9 / 7.8
	(% of economically active who are unemployed)		15.4 / 11.7		13.5 / 11.7
	Full-time student	755	10.0 / 3.6	568	19.1 / 3.6
	Total economically active 16-74	4719	62.3 / 66.7	1736	58.4 / 66.7
	Economically Inactive				
	Retired	572	7.6 / 13.2	111	3.7 / 13.2
	Looking after home	338	4.5 / 5.3	85	2.9 / 5.3
	Permanently sick/disabled	446	5.9 / 5.4	96	3.2 / 5.4
	Full-time student	1187	15.7 / 6.1	861	28.9 / 6.1
	Other	311	4.1 / 3.1	86	2.9 / 3.1
	Total economically inactive 16-74	2853	37.7 / 33.1	1238	41.6 / 33.1
Employment_s		Number	Percentage / W'ton	Number	Percentage / W'ton
	Employed residents 16-74	3723	100	1270	100
	Occupation				
	Managers/Senior Officials	238	6.4 / 8.2	74	5.8 / 8.2
	Professionals	511	13.7 / 13.7	182	14.3 / 13.7
	Assoc. Professional/Technical	391	10.5 / 9.9	150	11.8 / 9.9
	Admin/Secretarial	344	9.2 / 11.3	101	8.0 / 11.3
	Skilled Trades	322	8.6 / 11.8	82	6.5 / 11.8
	Personal Services (eg. care assts, hairdressing, caretaking)	389	10.5 / 10.3	127	10.0 / 10.3
	Sales/Customer Services	403	10.8 / 9.2	167	13.2 / 9.2
	Plant & Machine Operatives	437	11.7 / 10.9	122	9.6 / 10.9
	Elementary (eg. foundary, postal workers, kitchen assts)	689	18.5 / 14.7	265	20.8 / 14.7
	Total employed residents 16-74	3723	100	1270	100
	Hours worked per week				
	Part-time (up to 30 hrs per week)	1243	33.4 / 29.8	531	41.9 / 29.8
	Full-time (over 30 hrs per week)	2479	66.6 / 70.2	738	58.1 / 70.2
Qualifications_s		Number	Percentage / W'ton	Number	Percentage / W'ton
	None	2132	26.0 / 31.2	490	15.9 / 31.2
	Level 1 (eg. 1+ GCSE's)	994	12.1 / 14.1	364	11.8 / 14.1
	Level 2 (eg. 5+ GCSE's)	1093	13.3 / 14.9	425	13.8 / 14.9
	Level 3 (eg. 2+ A Levels)	1219	14.9 / 10.6	720	23.4 / 10.6
	Level 4/5 (eg. Degree & above)	1744	21.3 / 19.5	693	22.5 / 19.5
	Apprenticeships	107	1.3 / 2.7	30	1.0 / 2.7
	Other	907	11.1 / 6.9	360	11.7 / 6.9
	Total residents 16+	8196	100	3084	100

¹Holliss vincent, Wolverhampton City Centre Retail Update Study August 2014

²Wolverhampton City Centre Car Parking Study July 2011

³A number of these eg. ASDA are annexed to their area

⁴Wolverhampton AMR - 2012/13

⁵Census 2011 LNP Profile - best fit data (Ring Road = City Centre LNP)

⁶The Black Country Growth Plan 2013

⁷BOP study

⁸BRES 2013 mapped to LNP and AAP (LNP data rounded)

⁹Mander Centre, W'ton - Market Intelligence Feb 2012

⁹VOA Business Rates

¹⁰BID team

¹¹Pedestrian Movement Analysis - Intelligence Space Partnership (2007)

¹²Wolverhampton Research Summary Presentation (2012) Delancey

¹³JLL Commercial Office Space Study (2010)

¹⁴Wolverhampton Cordon Report 2012

Ticketed audience for Wolves Civic in 2011



Each orange dot represents a ticket buying household (UK audience only)
22% of the audience come from WV postcodes, 78% do not

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GREATER BIRMINGHAM and BLACK COUNTRY VISITOR ECONOMY STRATEGY 2014-2020

REPORT FOR MARKETING BIRMINGHAM

AUGUST 2014

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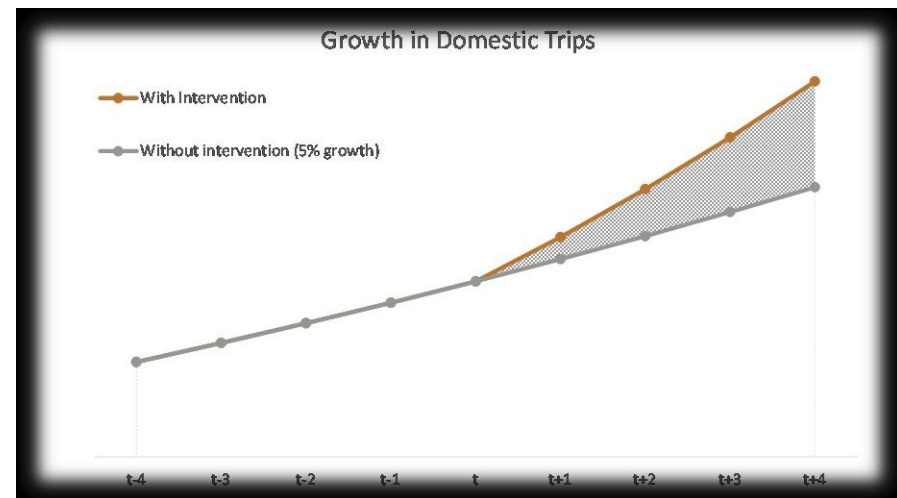
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1 EXECUTIVE SUMMARY

This Visitor Economy Strategy (VES) is about the tourism stakeholders in the Greater Birmingham & Solihull and the Black Country LEPs¹ collaborating to address shared challenges and realising growth opportunities. It is about focusing on four areas of activity which will add value to what is already happening at a local level. This strategy is about new activity and working more strongly as a partnership to achieve it. Destination Management Organisations (DMOs) are important local coordinators and delivery partners. The VES covers two LEP areas but is not constrained by that. Visitors do not recognise administrative boundaries and where it makes commercial sense, stakeholders will work with other partners across the West Midlands to deliver the VES.

The new activity set out in the VES has the potential **to create up to 9,000 additional jobs and c. £390m net additional GVA** and to **increase annual visitor spend by a further 20% by 2020**. The VES is aiming to achieve growth at least 2% higher than the VisitEngland annual target to ensure the visitor economy in Greater Birmingham and Black Country strides ahead and makes a significant contribution to the LEPs' targets for growth. The VES is divided into four pillars of activity.

- *Doing Business* - reclaiming Greater Birmingham's position as the premier conference and exhibition destination in the UK. This will be achieved by creating facilities, marketing and customer service that meets the needs of customers in the 21st century, by targeting and



Greater Birmingham VES, Economic Impact, *Regeneris Consulting, June 2014*

¹ The local authorities that make up the Birmingham & Solihull LEP are Birmingham City Council, Bromsgrove District Council, Cannock Chase District Council, East Staffordshire Borough Council, Lichfield District Council, Redditch Borough Council, Solihull Metropolitan Borough Council, Tamworth Borough Council, Wyre Forest District Council. The Black Country LEP comprises the Boroughs of Dudley, Sandwell, Walsall and the City of Wolverhampton.

- growing international conference & exhibitions and by making Greater Birmingham *the* place to study and work in this sector.
- *Going Global* - focusing marketing activity on growing leisure visits from six countries which are also a priority for inward investment.
- *Cultural Showcase* - to make much more of the outstanding cultural assets of Greater Birmingham that have the potential to drive visitors and position the area strongly nationally and internationally as a place to live, work and invest.
- *Going Local* - playing to the strength of Greater Birmingham's central location, its large population catchment and investment in its attractions to grow the volume and value of day visitors. This focus will also deliver excellent customer care, engender local pride and encourage people to choose tourism as a career option.

The VES builds on some big infrastructure investments - £200 million in Birmingham Airport, the Birmingham New Street Station development, and longer term, HS2 and the proposed extension of the trams between Birmingham and more parts of The Black Country. Product investment in Birmingham's retail and the new Birmingham Resorts World - the UK's first integrated destination leisure complex - make big positive statements about the Greater Birmingham leisure and entertainment offer and Birmingham's new library is a significant investment in cultural facilities and positioning the city's cultural credentials more strongly. That is reinforced by recent investment in visitor attractions across the strategy area with further developments in the pipeline including the proposed £20 million investment in Lichfield Cathedral, further investment in The Staffordshire Hoard and Mercian Trail and the Black Country bid to become England's third Global Geopark.

To realise growth opportunities, partners need to tackle an excellent but under-appreciated cultural offer; a well-established conference and exhibition sector that is struggling to retain its positioning in the face of new competition; lower hotel room rates than some competitors but gaps in the choice and range of hotels especially at the quality end; international visitor numbers that remain stable, while other areas are showing growth; and an over-reliance on repeat leisure day trips. Critically, to deliver the VES, stakeholders need to be more confident and ambitious about what they can achieve, show strong leadership and demonstrate effective partnership working across administrative boundaries.

2 INTRODUCTION

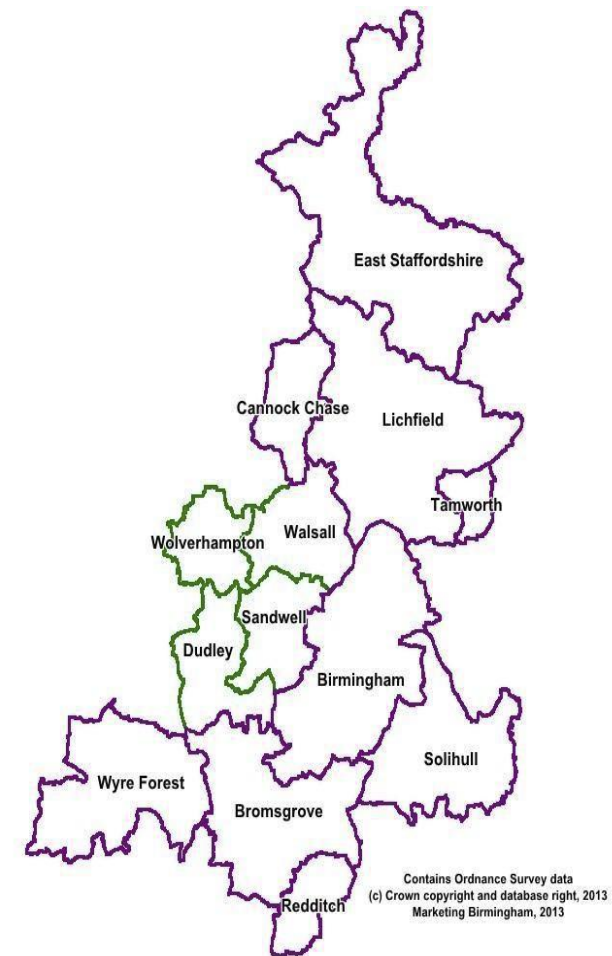
This is a Visitor Economy Strategy (VES) for the two LEP areas of Greater Birmingham & Solihull and The Black Country.

The area for the VES is large and diverse. It comprises the city of Birmingham, The Black Country, North Worcestershire and South Staffordshire. For the purposes of this strategy, the area will be referred to as 'Greater Birmingham'.

Major visitor destinations, attractions and brands lie just outside the VES boundaries, including the internationally recognised brand of Shakespeare. Therefore, stakeholders will work with DMOs and other LEPs in the West Midlands to deliver the aims of this VES, where it makes good commercial and market sense to do that.

The VES is about:

- **Contributing towards the economic growth of Greater Birmingham** through increasing jobs and GVA and supporting inward investment
- **Adding value to what is already happening** - new activity that will 'up the game' and improve the area's competitive positioning nationally and internationally.
- **Realising growth opportunities which cannot be delivered by individual destinations** but through joint-working can add value and deliver visitor economy benefits to Greater Birmingham overall
- **Informing and supporting strategies and tactical tourism activity within the destinations** including marketing delivery and communications, investment in culture, heritage and landscape, and investment by tourism businesses



It is about ensuring the visitor economy works effectively with other sectors to deliver wealth and help position Greater Birmingham as a place to live, work, invest and visit.

It takes a long term view of where the growth opportunities lie and identifies headline actions and new ways of working to begin to deliver that potential over the next 5 years. Delivering the VES requires stronger partnership working across the two LEP areas and new ways of working.

This VES is not intended to replace the destination work already taking place across the area. It is essential that this work continues to deliver well-managed destinations with a strong sense of place that invest in their visitor experiences. Work undertaken at a destination level is the foundation which will enable each area to benefit from the activity set out in the VES.

Here is a summary of the tourism character of the different areas in Greater Birmingham and some of the projects in the pipeline. It illustrates commitment and aspiration. Each area has a distinctive offer and is at a different point in its visitor economy lifecycle. Stakeholders need to determine how the VES can best contribute to realising growth for them and articulate that to their local partners.

Stakeholders may choose to diversify from their current strengths in order to meet the changing demands of the sector.

Benefits will be accrued in individual destinations through more visitors and spend, through job generation within the LEP travel to work area and through stronger market positioning nationally and internationally.

WORKING PAPERS DEVELOPED FOR THE STRATEGY

- Analysis of Current Market Performance
- MICE (Meetings, Incentives, Conferences & Exhibitions) Insight Paper
- Economic Context Paper
- Economic Impact Report

Birmingham	Birmingham is a major city with a commensurate infrastructure of retail, events, food & drink and evening economy. It has a particularly strong cultural offer and is a significant destination for business and conference tourism. Substantial investment has taken place recently in hotels, at New St railway station, in the new library and to the retail offer. There are longer term proposals for more tram links to the Black Country.
Solihull	Solihull is home to the NEC Group and to Birmingham Airport and so business and conference tourism is particularly important. The area plays is an important international gateway to Greater Birmingham. The new Resort World due to open shortly will raise its profile as a leisure destination for entertainment and shopping.
Black Country	The Black Country has a strong industrial heritage offer with a focus at Castle Hill (Dudley Zoological Gardens, the Black Country Living Museum and Dudley Canal Trust). Notable cultural venues include Wolverhampton Art Gallery and Walsall Art Gallery. There are other clusters of attractions e.g. at Stourbridge and Brierley Hill. It has a number of events and festivals including the potentially significant Festival of Glass and international Biennale in Stourbridge. The Black Country is

	bidding to become England’s third European and Global Geopark to help promote the area’s geological and cultural heritage and to show how the minerals of the area helped shape the industrial revolution and the world. There are major infrastructure improvement plans in the main rail gateway to the urban conurbation at the Wolverhampton City Centre Interchange and improvements to motorway junctions.
N Worcestershire	Worcestershire is a rural county and the North includes the attractive market towns of Bewdley and Stourport-on Severn, the Severn Valley Railway and a range of quality, small-scale accommodation in the Wyre Forest.
S Staffordshire	South Staffordshire is home to the historic city of Lichfield, its cathedral with the illuminated St Chad’s gospels and one of the four Staffordshire Hoard locations - the largest hoard of Anglo-Saxon gold ever found that is inspiring the Mercian Trail. Investment plans for the Cathedral investment plans include a new visitor centre. South Staffordshire also has a number of significant day visitor attractions including Cannock Chase Forest AONB and its extensive cycling trails, the National Memorial Arboretum, Drayton Manor theme park and Tamworth Castle which also hosts the Staffordshire Hoard.

PROCESS

Over 90 individual stakeholders have been consulted at key stages in the development of this strategy. This engagement took the form of three workshops to help establish shared challenges and opportunities, three presentations of the draft VES, two action planning sessions to help shape the way forward and individual consultations. The draft final document was presented to stakeholders and made available online for further comment.

The VES is supported and informed by robust research and a suite of Working Papers. This suite of documents is available from Marketing Birmingham and provides the evidence base for the VES and more detail about the economic impact.

3 WHERE WE ARE NOW

The visitor economy is a significant contributor to the economy of Greater Birmingham and the Black Country generating nearly **£7 billion of expenditure and supporting 82,000 jobs**.

To put that in perspective, England's visitor economy generates £97 billion each year, employs in excess of two million people and supports thousands of businesses, both directly and indirectly.

Business, conference and exhibition tourism is a particular strength for Greater Birmingham in absolute terms and compared with other city regions. Birmingham is ranked 2nd in the UK after London on volume of business tourism trips.

There is also a very healthy day trip market that benefits from a large catchment, good connectivity and a quality range of destinations and experiences. The area covered by this strategy has strong cultural assets, particularly in the arts and excellent industrial heritage credentials.

Significant progress has been made in developing the infrastructure and improving the quality of the product and of the visitor experience that enables growth.

- £200 million investment in Birmingham Airport including a new runway opens up additional international opportunities.
- Birmingham New Street Station development will create a transport hub for the West Midlands
- Birmingham is currently undergoing major retail investment.
- The recent investments in the NIA and in the new Birmingham Resorts World - the UK's first integrated destination leisure complex - make big positive statements about the Greater Birmingham leisure and entertainment offer

SNAPSHOT OF TOURISM IN GREATER BIRMINGHAM & THE BLACK COUNTRY

- 70m visitors p.a. spending £7bn
- 81% are day visitors
- Overall visitor numbers relatively static - up 1.2% (2011-2012)
- Visits to attractions up 9% (2011-2012)
- Birmingham & Solihull LEP area account for nearly three quarters of tourism GVA
- Birmingham accounts for 85% of overseas visitors, 40% of all day trips and 63% of all UK overnight trips.
- Business is by far the strongest reason to visit for overnight trips.
- Shopping, Birmingham city centre and restaurants are the most popular activities followed by attractions, museums, arts & culture, heritage, music & events
- Visiting attractions (36%) and visiting museums (30%) are particularly important motivators for trips to the Black Country

From: Tourism Strategy for Greater Birmingham and the Black Country - Data and Intelligence review, Regional Observatory, Marketing Birmingham, 2012

- Birmingham's new library is a significant investment in cultural facilities and positioning the city's cultural credentials more strongly. There are also aspirations to realise the potential of the Jewellery Quarter as a cultural quarter and distinctive visitor destination within the city
- The Staffordshire Hoard and Mercian Trail presents a new and exciting heritage experience offering further growth potential
- £16 million public and private investment into Castle Hill
- Recent investment of around £100 million in West Midlands Safari Park, Severn Valley Railway and Drayton Manor Park - all established visitor attractions with growing visitor numbers.
- Birmingham is rolling out legible city as part of improving place management

Longer term, proposals in the pipeline include:

- The £20 million masterplanning for Lichfield Cathedral, which includes a new visitor centre
- The Black Country bid to become England's third European UNESCO Global Geopark based on its exceptionally important geological and related industrial and cultural heritage
- A major new visitor centre for the National Memorial Arboretum
- A new vision for the future of the national football centre near Burton to include an elite golf academy, a sport business campus and a new 150-bed hostel for youth teams attending the site and a host of new pitches.
- Multi-million investments in the main rail gateway to the urban conurbation at the Wolverhampton City Interchange Centre and M-road gateways from the north and east
- HS2 that will further enhance connectivity
- Proposed extension of the trams between Birmingham and more parts of The Black Country which will deliver improved connectivity within the urban core

Greater Birmingham needs to be resourceful and to present a strong confident place that will encourage private sector investment in new tourism product and look at new private sector-led ways to support revenue funding the visitor economy. The proposed TBID for Birmingham is one such opportunity and the BIDs and Destination Management Plans across the area provide opportunities for local partnerships to deliver quality management, marketing and visitor experiences.

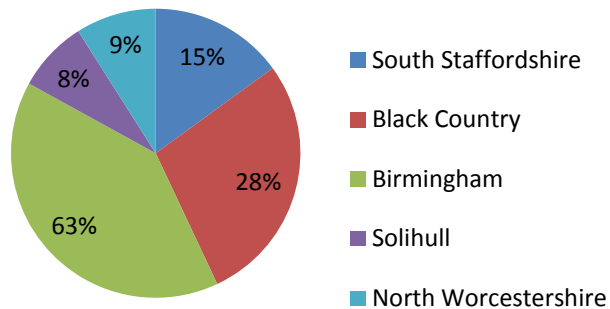
However, despite these strengths and this investment, Greater Birmingham and the Black Country faces a number of challenges:

- Leisure tourism is predominantly day visits on repeat trips drawing on a West Midlands catchment
- Hotel occupancy and RevPAR remain flat - while other UK destinations are recovering
- Overseas visits to Birmingham remain stable - other cities have seen growth
- Despite strong growth in the number of major international events attracted to Birmingham - worldwide rankings have fallen
- Investment in visitor attractions and experiences has been good but none have a strong international profile
- The profile of the cultural assets needs strengthening because culture has the potential to drive more visits to Greater Birmingham and the Black Country.

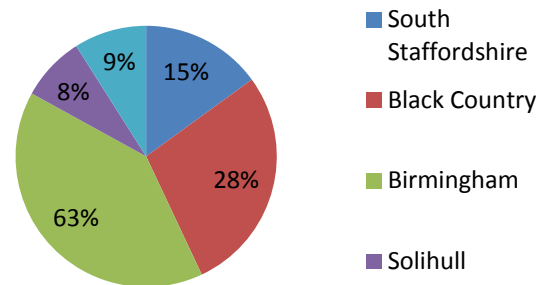
Here are some headlines from the Working Paper - *A Review of the Visitor Economy of Greater Birmingham - Market Performance* that show the share of volume and value of the visitor economy across the VES area. They provide the context and the baseline for the VES priorities and potential for economic growth.

SHARE OF DAY TRIPS AND UK OVERNIGHT VISITORS

Domestic Overnight Trips 2010 - 2012



Domestic Day Trips 2011 - 2012

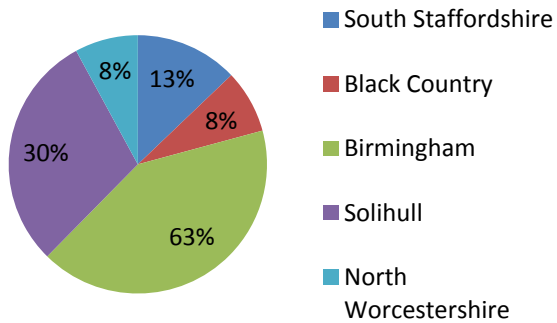


REVENUE FROM OVERNIGHT VISITORS PER HEAD OF POPULATION	
Birmingham	£892
Solihull	£1,456
Black Country	£226

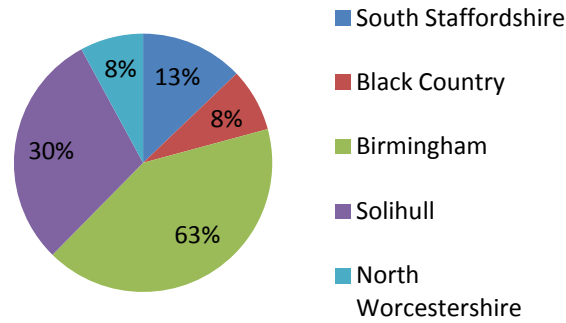
SHARE OF GVA & TOURISM GVA

Tourism represents c. 2.65% of total GVA across the two LEPs. This compares with 3.3% for England as a whole.

Estimated GVA (Total - £52.8bn)



Estimated Tourism GVA (Total - 1.4bn)



Source: NOMIS & Blue Sail estimates

4 MAKING A DIFFERENCE

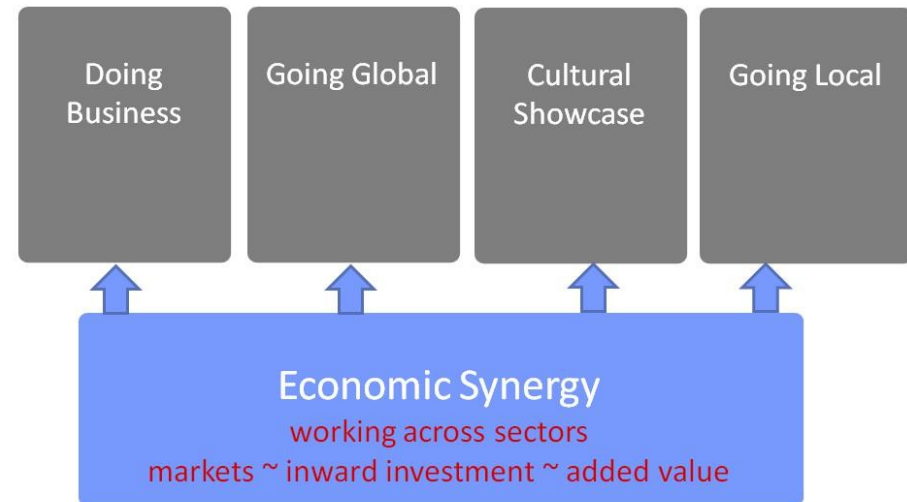
VisitEngland's target is to grow tourism in England by 5 per cent on average year on year over ten years to 2020. For Greater Birmingham and the Black Country to outperform its competitors, it will need to deliver a higher annual growth than the national average. This strategy has based growth predications on an uplift of between 7-9% - that is an ambitious target and requires confidence, aspiration and commitment to making a big leap forward in the visitor economy.

It means capitalising on those areas where Greater Birmingham and the Black Country has current or potential competitive strength and which also offer high returns on investment. **The VES must focus on additional added value activity which is not being undertaken already and which cannot be delivered effectively at a destination or local level. Partners need to work together to achieve that.**

It requires tight focus of resources - people and finances - on where they will deliver the highest return on investment. It means thinking big, being confident, doing things differently and working together effectively.

The VES leads with 4 pillars that deliver focus and which have been researched and tested to demonstrate they have the potential to deliver a strong return on investment. These pillars create a framework for action and share three important features:

- They have potential to deliver direct and indirect economic benefits across Greater Birmingham
- They need partners to work together across the VES area to realise the economic benefit - individual destinations cannot achieve the outputs individually.
- They are designed to work productively with other priority economic sectors and markets - that means the visitor economy will benefit from the growth and investment being made in Greater Birmingham and contribute to creating that growth. This will confirm the visitor economy as an important sector for Greater Birmingham and help demonstrate its value to the regional economy.



The economic impact assessment of taking this approach has the potential to achieve between **£210m to £390m net additional GVA, 4,700 - 9,000 jobs and between £92m-173m visitor expenditure²**.

PILLARS

The four pillars are **Doing Business** (meetings, conferences and exhibitions), **Going Global** (international leisure tourism), **Cultural Showcase** (using culture to build distinctive market positioning and drive more visits and spend) and **Going Local** (capitalising on the strengths of the visitor attraction offer, the significant population catchment and skilling local people to take up jobs in the sector).

Stakeholders across the 2 LEPs will work together using these four pillars to drive more benefit from the visitor economy. Sections 5-8 set out more about each pillar, the rationale and actions.

THEMES

Themes that work across the 2 LEP areas provide an opportunity to present the visitor offer in more powerful ways and to take a stronger critical mass of experiences to market. Themes provide new opportunities for individual businesses and destinations to attract more visitors to underpin viability and to access new markets. The themes will help ensure more destinations and businesses benefit from the VES pillars.

The themes can be used as a new way of working together across boundaries and provide opportunities for collaboration with destinations and attractions that sit beyond the boundaries of the VES and with whom it makes sense to undertake joint activity when targeting particular markets.

² Range based on between 7-9% growth. The full economic impact assessment is available online in the *Greater Birmingham VES Economic Impact Report, Regeneris, 2014*.

Entertainment	Pleasure	Enlightenment	Business
<ul style="list-style-type: none"> •Festivals •Performances •Attractions •Sport 	<ul style="list-style-type: none"> •Shopping •Eating •Strolling •Socialising •Enjoying the countryside 	<ul style="list-style-type: none"> •Galleries •Museums •Heritage •Knowledge 	<ul style="list-style-type: none"> •Conferences •Meetings •Exhibitions

The themes are relevant across all markets - international and domestic - but are not designed as consumer facing brands. They can be used:

- To facilitate pan-area marketing and partnerships among places and/or businesses
- As a useful way to look at product investment priorities and to help support the rationale for funding bids
- To enable individual destinations and businesses reach new audiences by presenting a critical mass of experiences.

UNDERPINNING ACTIVITY

The success of the four pillars means delivering on underpinning activity:

- **Excellent gateways, welcome and the visitor journey** - the new runway at Birmingham International Airport and the major investment in Birmingham New Street Station create opportunities now to showcase Greater Birmingham and to create strong and confident first impressions. That means delivering an excellent visitor welcome at all points of entry and throughout the visitor stay. Investment in legible city in Birmingham needs to be supported by excellent customer care and well maintained public realm across Greater Birmingham.

CASE STUDY 1: NANTES

Nantes is an island city on an estuary of the River Loire. It has an urban centre and rural hinterland with a strong industrial heritage, particularly in shipbuilding. It has a distinct regional identity and cuisine as well as a strong creative sector and student population which helps define its contemporary identity. It has been actively trying to reposition itself for tourism investing heavily in its urban fabric and public realm, its waterfront and in culture including a signature visual arts festival 'Le Voyage à Nantes' designed to attract cultural tourism'

Nantes has developed a clear vision of where it wants to be with priority and direction given to projects across all sectors and the wider region. Strong leadership has brought together a multi-agency partnership with a longer term strategic positioning. There has been a conscious cultivation of Nantes as a creative, young, edgy, innovative place to live, to work and by extension - to visit. **Nantes is treated as urban core and access point but cooperation with neighbouring councils has produced ways of drawing the visitor out along the estuary and extending their stay.** The waterways have been used literally as the channel for this - exploiting a theme of exploration and navigation as well as strategically placed public art and points of interest and support for the evening economy of bars, cafes and restaurants.

An over-arching regional body has been set up to deliver the vision with four working groups, including a dedicated inter-organisational entity with budget to develop an arts event to drive cultural tourism to Nantes. **Nantes investment in culture has resulted in a 57% increase in visitor numbers in the six years to 2012.** The city's authorities spent around €9 million of its ERDF on culture related investment.

- **Improved connectivity within the area** - excellent public transport is essential to ensure that the job opportunities created in the visitor economy are accessible to people wherever they live in Greater Birmingham, and to enable visitors to explore easily using public transport. It also encourages investors to look at development opportunities across a wider area. The visitor economy cannot deliver transport investment but is an important voice and partner to help build a case for it. Plans for enhanced tram connections between Birmingham and the Black Country in particular will open up opportunities and investment in Wolverhampton rail station as an additional main rail line gateway into the area
- **A wider range of hotels to meet the needs of growth markets** - the VES is about growth from particular visitor markets. Existing hotel stock has capacity to meet the increased demand of some but not all of this growth. This is not about numbers of rooms but about variety and delivering the range and quality these growth markets want. Investment and upgrading of existing hotels may go part way to meeting this need. However, the area which this strategy covers lacks the range of hotels expected of a city of its size and stature but which are essential to realise potential and present a competitive offer. Town house and independent boutique hotels offer the distinctive experience that visitors increasingly expect from a city. 4/5* hotels will help grow the choice and quality of venues and places to stay required to compete effectively for certain high value conferences and international leisure markets. The location of any additional hotels within Greater Birmingham is dependent on land availability, access and destinations meeting the requirements of investors. Major regeneration plans should be looking for site and developer opportunities to meet this gap in the product offer. There are various proposed high-end hotel investments in the pipeline and it is essential that Greater Birmingham actively supports those investments that will add variety to the current offer and seeks further opportunities.
- **Knowledge sharing** - the Regional Observatory is a rich source of up-to-date information about the visitor economy. Partners need to use this intelligence more effectively to inform decisions and measure success.

QUALITY OF LIFE

The visitor economy has an important role to play in delivering quality of life in Greater Birmingham to support inward investment objectives and make Greater Birmingham a desirable place to live and for a company to locate.

There has been significant investment in the industrial heritage of the city region and to many of its visitor attractions; this investment will continue to be important to deliver a quality, competitive day visitor experience for people living in Greater Birmingham as well as visitors travelling from further afield. The quality and offer of the countryside and rural towns in the Greater Birmingham are an important part of this offer. Investment in the good design and maintenance of public spaces is important to create the environment in which tourism takes place

and which plays a role in encouraging visitors to stay longer and explore further. The visitor economy can support arguments to invest in public spaces. Visitors also provide important additional trade for restaurants and shops and help with the viability of local businesses and the vitality of places.

5 DOING BUSINESS

This pillar has the potential to deliver:

£30m to £43m GVA from increased domestic business trips

Greater Birmingham VES, Economic Impact, *Regeneris Consulting, June 2014*

“The Meetings, Incentives, Conventions and Exhibitions (MICE) Industry is one of the key drivers of tourism destination development and an important generator of income, employment and foreign investment. Beyond economic benefits, the MICE industry presents opportunities for knowledge sharing, networking and capacity building, making it an important driver for intellectual development and regional cooperation.” Taleb Rifai, Secretary General, UN World Tourism Organisation.

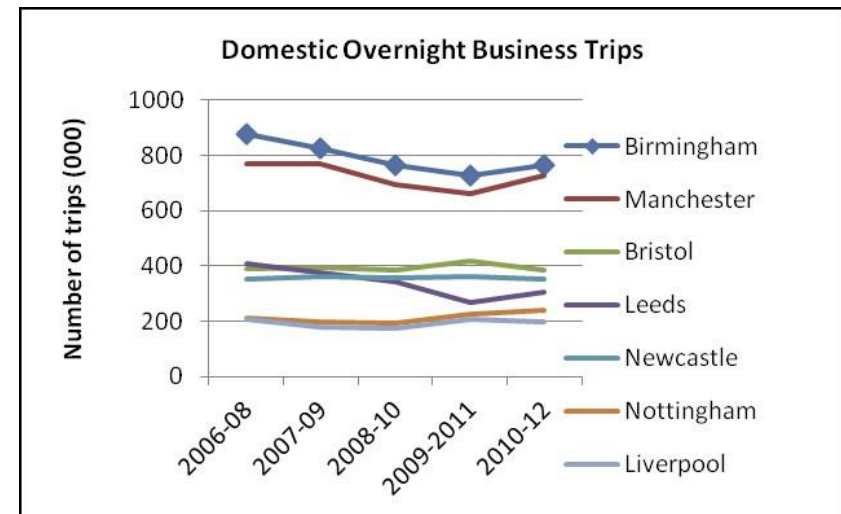
Greater Birmingham and the Black Country has a thriving business tourism infrastructure including the showcase venues of the NIA, NEC and the ICC.

Outside of London, it attracts the highest volume of conference and business tourism. To retain that status and in the face of growing competition from new state-of-the-art conference venues and a push for conferences and exhibitions in other UK cities, Greater Birmingham needs to re-establish its predominance by ensuring it delivers a conference offer fit for the 21st century.

Business and conference tourism is high value and its benefits spread across a wide geographical area. It directly supports a range of businesses including hotels, restaurants and entertainment venues.

Birmingham’s positioning as a conference city is important for inward investment across Greater Birmingham. Large conferences & exhibitions attracted into the city may mean the city is ‘full’ at certain times in the year. That can help spread smaller conferences and their associated hotel bookings and delegate spend into Greater Birmingham and the Black Country. That pattern of activity needs to be encouraged and supported to ensure the benefits of conference and meetings trade is spread across the Greater Birmingham area.

It also means that looking to the future; the city will need to make choices about which large conferences and exhibitions to prioritise. Those choices need to consider both the direct and immediate economic benefits and wider market positioning opportunities of particular conferences and exhibitions.



This includes considering the different benefits of 'one off' big events and those which will return in future years.

The factors which established Birmingham in the 1990s as the premier destination outside of London for conferences, meetings and exhibitions are no longer enough to guarantee market share when other UK cities can claim the same advantages. In the same period the conference and business events market has changed dramatically.

Taking the trends in international conferences as a guide to the marketplace:

- The number of events has increased but number of participants per meeting has declined
- Conferences are shorter in length
- Use of meeting facilities in hotels has gradually increased over the last 20 years at the expense of conference and exhibition centres.
- Yet over the same period there has been significant investment in existing and new large conference centres³.

Cities still need a large showpiece exhibition centre to be major players in the conference market and to serve large conferences & exhibitions but today these venues are as much about market positioning as they are about capacity to deliver events. They act as important drivers of investment in new large hotels that both serve the conference centre and provide additional conference venues.

Now there are more conference cities with a strong and varied offer, conference organisers have more choice. They 'buy' the image and reputation of the city as well as the venue facilities and easy access. Companies and organisations want to host conferences in places that say something about their values as a company. Research shows that price, added value, location, suitability of venue plus brand fit and quality assurance are the key decision making factors in conference venue selection⁴ for the global corporate market.

TRENDS IN INTERNATIONAL BUSINESS & CONFERENCE TOURISM

- Global business travel spending is forecast to grow around 7-8% annually
- International Congress and Convention Association European City Rankings - Manchester (42nd), Glasgow (35th), Liverpool (71st) and Birmingham (89th)

Sources: Global Business Travel Association (GBTA) Outlook - Annual Report & Forecast, ICCA 2012

³ Meetings, Incentives, Conferences and Meetings Paper, Blue Sail

⁴ Advita White Paper - consolidation of meetings management, 2012

Global business travel spending is forecast to grow over the next few years. There is the potential for Greater Birmingham to generate inbound business visits aligned with its international inward investment activity⁵. International conference and exhibitions business is particularly high value.

Changes in the marketplace mean taking a fresh look at conference and exhibition tourism.

This pillar needs to align with priority economic sectors identified for Greater Birmingham to join up opportunities effectively and drive additional economic value. This includes closer working with the universities in particular in relation to looking at conference development opportunities within Advanced Engineering and Life Sciences.

There are five areas that Greater Birmingham needs to tackle:

- **To continue to innovate and evolve the NEC venues** - to ensure the showpiece venues remain premier league and competitive. This is investment in facilities, service and value added packages. The proposed sale of the NEC Group will help to strengthen the commercial positioning of the group in the face of growing competition.
- **To encourage investment in mid-range conference venues longer term to build capacity and offer wider choice** - this should be first about upgrading and expanding existing venues and potentially investment in a new venue, subject to demonstrating demand, given current investment plans including at Resort World, at West Midlands Safari Park and in Wolverhampton. The total offer should also ensure that it can offer the smaller and more flexible spaces and the technology infrastructure package that conference organisers are seeking. Good access by public transport is essential for

⁵ Opportunities for Growth in the UK Events Industry, Business Visits & Events Partnership, 2011

CASE STUDY 2: BERLIN

Berlin is 3rd in ICCA rankings, the city has experienced a 32% increase in the number of international association meetings in the 5 years to 2013.

Berlin has a long established international exhibition and convention industry which has experienced significant growth since reunification of the city. Berlin has a strong science and research base through its universities, predominantly in the medical sector which attracts significant medical association gatherings.

Berlin is able to support a large conference sector because it has over 125,000 beds of three, four and five star hotels and an excellent public transport network links the airport, hotels, meeting venues and the city centre. However, it is the conference + culture offer that is a key factor of its success. Like Vienna, Berlin uses that as an important strand to its market positioning. This is a winning combination for the MICE market. Berlin has three opera houses, several symphony orchestras and world-renowned museums. It also offers a strong night life scene.

The ICC Berlin is one of Europe's biggest convention buildings. To meet growing demand and because of the need to modernise and redevelop the ICC Berlin, the city has expanded its facilities with the construction of a new venue CityCube, which is already booked out for its inaugural year 2014 and is almost fully booked for 2015. CityCube is a multifunctional venue for trade fairs, conferences and events comprising flexible wall partitioning, numerous conference rooms, offices and meeting rooms situated over two floors.

The Berlin conference website provides links to Visit Berlin <http://www.visitberlin.de/en> and to 'the region all around Berlin' <http://www.brandenburg-tourism.com/>

Conference markets and that will determine the location of opportunities. Improvements in regional transport connectivity will open up potential across a wider geographical area over time

- **To target national and international conferences that help with the image of Greater Birmingham as a ‘thought leader’ within key sectors and industries** - this means creating a balance between the two economic and investment drivers of value of bednights (short term benefit) and the role a conference can play in the image and positioning of Greater Birmingham & the Black Country (longer term competitive positioning).
- **To offer and deliver ‘value added’ conference experiences and new creative marketing by creating a joined up sales force** - this will bring together Marketing Birmingham, NEC Group, universities and other venues to focus on excellent packaging and innovations on pricing to position Greater Birmingham competitively in the conference and exhibition sector. There will be a stronger focus on targeting and growing the number of international conferences and exhibitions because of their higher value. It will also extend to dressing the city and gateways for major exhibitions, events and conferences as part of the investment in the customer journey (see Going Local).
- **To ensure existing hotels deliver the quality of offer and range of services expected by the business, conference and exhibition sectors.**
- **To encourage a wider range of types of hotels over time to ensure Birmingham delivers the accommodation offer expected of a world class city and required to serve both international conference and leisure markets** - this requires diversifying into town house and 4/5* hotels that already form part of the quality offer in competitor cities and urban areas.
- **To build Greater Birmingham as a centre of excellence in conference and exhibition skills and education** - this will provide a new way of positioning Birmingham as a conference leader. The focus will be on work placements, apprenticeships and industry working with schools, universities and other educational establishments including on course content. The approach again provides opportunities to achieve international reach through partnering and twinning with other educational institutions, e.g. Ravensburg University of Applied Science in Germany that has an established reputation in this field.

In 2012, Glasgow City Marketing Bureau and SECC launched a new service for conference organisers called ‘You 1st’ - a partnership service providing new-to-market solutions. Projects include a city lighting project to illuminate the iconic Clyde Arc Bridge and University of Glasgow in the brand colours of the European Congress of Immunology to offer the ultimate welcome to delegates.

<i>Actions</i>	<i>Partners (lead in bold)</i>	<i>Resources</i>
<p>Create joined up sales force for conferences and exhibitions - audit opportunities; target, map and plan national/international opportunities; develop inclusive packages. Build marketing capacity over time</p>	<p>Marketing Birmingham, NEC venues, Universities and other large venues</p>	<p>Align budgets. Prioritisation and coordination of activity</p>
<p>Position Greater Birmingham as a centre of excellence to study and develop a career in the conference, exhibition and events sector by coordinating and communicating better what is happening now and building on it - audit and map current activity, identify gaps and develop innovative programmes with industry including course development and delivery, apprenticeships and work placements.</p>	<p>Sector Skills Council e.g. people 1st, industry, universities, colleges, trade associations, LEP Employment and Skills Board</p>	<p>ERASMUS EU Funding, National Programmes</p>
<p>Invest in a wider choice of hotels - town house/boutique and higher end e.g. 4/5* to increase conference and exhibition competitiveness (will also enable growth in international leisure - see Going Global) - identify sites across 2 LEP areas, package and promote propositions to investors/developers</p> <p>Review current developments in pipeline to understand the type of hotels coming forward and barriers to investment (types of hotel and location).</p>	<p>Marketing Birmingham, local authorities (identify sites/promotion)</p>	<p>Coordination of staff knowledge and resources</p>

6 GOING GLOBAL

This pillar has the potential to deliver:

£11.0m to £26.2m GVA from extra international holiday trips from key markets

Greater Birmingham VES, Economic Impact, *Regeneris Consulting, June 2014*

Greater Birmingham and the Black Country can grow the value of its visitor economy by increasing the volume of leisure breaks. Overseas visitors stay longer and spend more. They tend to have more positive perceptions than domestic short break markets because they have fewer preconceptions about destinations. **VisitBritain research shows international visitors have limited knowledge of destinations within the UK beyond London and a few iconic places and brands.**

The emphasis on international markets will help realise the investment of £200m in the airport and exploit the opportunity presented by Resorts World as well as the investment made in cultural (arts and heritage) infrastructure in all parts of Greater Birmingham. It will also mean that Birmingham steals a march on other UK cities which are spreading their marketing resource across domestic and international markets and transcend the negative perceptions of Birmingham and the Black Country in the domestic market.

The objective is to add value to what is already happening by:

- Focusing on international markets which individual partners will find difficult to reach
- Prioritising international markets which are high growth and high spend
- And which complement business investment and other international promotional activity.

- Since 2008 holiday visits from overseas markets to the UK have increased by 10% but decreased by 15% to the West Midlands (*International Passenger Survey*)
- Only 18% of inbound trips to Birmingham city are for leisure - significantly less than other cities (*IPS*)
- International leisure visitors spend almost twice as much per trip as domestic - £683 compared to £374 (*2013 Visitor Survey, MB*)
- The 6 priority markets identified here account for 35% of all spend (*IPS*) and all are predicted to grown in the next 5 years (*VisitBritain*)
- Only 10% of UK visitors were motivated by the city's reputation compared to 44% from all markets, 79% of Chinese and 48% US (*RO6 Multi Country Study, Regional Observatory 2013*)
- Two-thirds of international visitors to the West Midlands come to Birmingham and a further third to the rest of the region (*IPS*)

This will support 'Birmingham's' positioning as an international city, complement and reinforce the international conference and exhibition work and benefit all sectors of the economy across the city region.

'Birmingham' is the 'attract-brand' - in marketing to international markets to simplify the proposition to potential visitors who have limited knowledge of place names and geography in the UK. This follows the successful approach taken by cities such as Manchester, Liverpool, Nantes and Dublin.

Brands are important too as part of the attract message too. Think of Lord of the Rings and New Zealand; the Beatles and Liverpool. Stratford, Shakespeare, Cadbury and Jaguar-Land Rover are Greater Birmingham's global brands.

Overseas visitors spread their visits and spend around Greater Birmingham. They typically undertake a wide range of activities - shopping, eating out, visiting attractions, museums, arts & cultural venues and visiting canals. That provides opportunities for destinations across Greater Birmingham. There will be opportunities to pull visitors through from the city to other parts of Greater Birmingham. This opportunity is especially strong from well-travelled often repeat visitors from Germany, France, USA and Australia who are travelling independently and typically take longer touring or multiple destination holidays.

The 'attract-brand' should be supported by specific themes, sub-destinations and attractors to present an appealing offer of sufficient depth and quality. The quality and range of visitor attractions in Greater Birmingham presents plenty of opportunities. These opportunities should focus on heritage, contemporary culture and iconic global brands such as Shakespeare because VisitBritain research shows these are the experiences which motivate people to choose Britain for a leisure visit. .

Prospective international markets for Greater Birmingham have been researched and assessed on the basis of:

CASE STUDY 3: CITY PLUS - DUBLIN

Dublin has been losing market share to other European cities particularly from its important British market. In 2012 Fáilte Ireland, the national tourism development agency, working with Tourism Ireland, which markets Ireland internationally, commissioned an in-depth market research programme which identified new growth segments for Ireland as a whole.

Fáilte Ireland and Tourism Ireland took the bold step of selecting one main segment on which to focus its marketing effort for Dublin - the Social Energisers.

In tandem it recognised the need to refresh the Dublin proposition by extending it beyond the city core to include Dublin Bay and Mountains. An experience-led development programme has been put in place working with the industry (and including non-traditional partners like clubs, cafes and lifestyle media) to define and develop new experiences - based around activities and culture - to take to market.

It has begun a campaign of activity to create a buzz around what it is doing including a showcase for Meitheal with over 150 tour operators and 100 businesses. Meitheal is Fáilte Ireland's largest in-Ireland event where over 300 international buyers attend a two day workshop with pre-arranged scheduled appointments between Irish trade partners and overseas buyers. The tourism event received great reviews see <https://www.youtube.com/watch?v=pBluvGytVnE&feature=youtu.be>

- Size and significance of current market to Greater Birmingham and the Black Country
- In-bound direct air links
- Current market share and how well the area performs in that market
- Economic priority i.e. fit with other sectors and their geographical markets
- Growth rates within the market
- Competitiveness and product fit with what those markets are looking for

Using these criteria following markets have a good product fit and offer the best prospects:

Country	Rationale
Germany	Current significant market, good market share, economic priority, air links
France	Current significant market, economic priority, good growth rates, air links
USA	Current significant market, economic priority, good growth rates, air links
Australia	Current significant market, West Midlands performs well, economic priority, good growth rates
India	Current market, West Midlands good market share, economic priority, Air links and more planned
China	Economic priority, good growth rates, planned air links

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In summary the key offer Greater Birmingham and the Black Country has across these markets is cultural heritage and contemporary culture, shopping and (for some markets) countryside and canals. The travel trade is important particularly for developing markets. Direct links are important but less so for long haul markets. It will be important to tailor the proposition and key messages to each target segment within each market.

Here are pen portraits for each country. Marketing Birmingham and VisitBritain have extensive research and intelligence on these markets which can be used for detailed campaign planning.⁶ Marketing activity will be determined by resources available.

⁶ Profiles are drawn from VisitBritain research. Market data from International Passenger Survey is for all inbound visits based on 3 year averages due to sample size. Growth rates are for spend 2006-12 not adjusted for inflation. 'Looking for' is from a holiday to UK.

The focus will be on tailored intervention aligned to other promotional activity or in support of it, e.g. conferences, university marketing or FDI sales missions. In certain markets leisure marketing might lead, in others - such as China - leisure marketing will be in support of other economic sectors.

Germany

Current market: 98,000 visits £28M spend +12% growth

From: Berlin, Frankfurt, Dusseldorf

Who: Couples, families (age 35-44), tour groups

Insights: affluent, enjoy travel, like easy access

Looking for: Built heritage, countryside, educational experiences, quirky

France

Current markets: 83,000 visits £20M spend +43% growth

From: Paris

Who: (Age 25-44) Couples, families with older children, tour groups

Insights: boomer segment growing, fashion conscious, less comfortable with English, like easy access

Looking for: Cultural heritage, shopping, good food (but don't expect it)

USA

Current market: 57,000 visits £24M spend -16% growth

From: New York (and California once air routes are in place).

Who: Boomers - couples, friends & groups, families

Insights: affluent but value conscious, specialist tours growing, family segment growing

Looking for: Built heritage, cultural heritage, pubs and eating out, countryside, walks, parks & gardens, quality accommodation & large rooms, a warm welcome

Australia

Current market: 28,000 visits £25M spend +53% growth

From: No direct links (but less important for long haul)

Who: All age groups. VFR, partner, adult friends, adult family

Insights: all age segments growing, enjoy meeting locals, value conscious

Looking for: Built heritage, countryside, pubs, fun, museums, galleries, theatres

China

Current market: 7,000, £10M spend +139% growth

From: No direct links (less important for long haul)

Who: Partner, solo, adult friend, groups (age 16-44)

Insights: 2 in 5 combine UK trip with other country, student market very important, likely to be on first visits, brand conscious

Looking for: Built heritage - religious buildings, castles; cultural heritage - museums; parks & gardens; shopping = jewellery and watches; Chinese food, welcomed

India

Current market : 19,000 visits, £13m spend 6% growth

From: Delhi (direct route) & Mumbai

Who: Partner, adult family, groups (age 25-44)

Insights: Not hugely active on hols, more so with VFR

Looking for: Built heritage most important, performing arts, countryside

<i>Actions</i>	<i>Partners (lead in bold)</i>	<i>Resources</i>
<p>Develop bespoke campaign plans for each country market using an appropriate brand narrative and specific propositions. Ensure integration with other international promotion, exploit business brands and UKTI opportunities, especially where these can support connecting the visitor economy more closely with other inward investment priorities</p> <p>Deliver series of creative campaigns designed to build awareness and grow international staying visits and spend.</p>	<p>Marketing Birmingham</p>	<p>Marketing Birmingham (MB) time</p>
<p>Develop strong travel trade relationships in UK and on-territory to establish Greater Birmingham proposition and product</p>	<p>Marketing Birmingham</p>	<p>MB time</p>
<p>Partnership and Alignment - identify and work with partners (within and outside the area, tourism and non-tourism) to develop joint marketing, extend reach, align communications. To include Staffordshire Destination Management Partnership, Shakespeare's England and Visit Worcestershire.</p>	<p>Marketing Birmingham VisitBritain/VisitEngland Destination Management Organisations (DMOs) & local authorities Tourism businesses Airport Transport carriers Universities Regional companies with strong international brands</p>	<p>MB time ERDF LEPs Businesses</p>
<p>Work towards delivering an outstanding welcome and cultural understanding - Improving capacity and capability of visitor economy businesses to meet needs of priority markets - market briefings, seminars, workshops, cultural training etc</p>	<p>Marketing Birmingham Trade associations People 1st DMOs & local authorities</p>	<p>MB time ERDF LEPs People 1st Businesses</p>

7 CULTURAL SHOWCASE

This pillar has the potential to deliver:

£81m GVA from four signature events
£8m GVA from a 'Year Of' Event

Greater Birmingham VES, Economic Impact, *Regeneris Consulting, June 2014*

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Greater Birmingham and the Black Country has an exceptional cultural infrastructure but has, to date, not fully capitalised on its potential.

The economic regeneration, repositioning and promotion of many cities is based on their cultural offer. As we have moved into an era where experiences have become more important than 'things', cultural experiences have led the way for many cities establishing themselves in new ways within new markets. From Glasgow to Gothenburg to Belfast to Rotterdam industrial cities have invested in their cultural assets and made people think about these places differently and are attracting new audiences.

Culture, including events and festivals, provides potential for Greater Birmingham to showcase its excellent product; in particular what is distinctive and special about the area, which it can use to position the area more strongly in a national and international marketplace.

Considerable investment has taken place in venues for the visual arts - including in the first-class galleries in Walsall and Wolverhampton; Birmingham City Museum and Art Gallery has received HLF funding for a new gallery for the Staffordshire Hoard; and plans are in place for a major

- Heritage and culture is the number one reason for tourists visiting UK (*VisitBritain*)
- Unique festivals motivate visits - the Perugia chocolate festival attracts 1 million visitors
- And spend - the Manchester International Festival had an economic impact of £38M, attracting £26M media coverage and directly benefiting 251 of the city region's businesses
- Market research repeatedly demonstrates that high quality cultural infrastructure enhances the reputation of destinations and motivates visits
- Cities that have invested in culture have had more economic success than those that invested only in cars and airports. In the knowledge society, a lot of innovation - when you put it in economic terms - depends on creativity (*Helga Truepel, German Green MEP, 2012 speaking about the findings of a major study on the impact of culture oneconomies*).

⁷ To avoid double-counting, account for deadweight and displacement only a proportion of this GVA has been included in the total figure.

expansion of the Ikon Gallery. Birmingham city has a performing arts offer second only to London with world-class programmes delivered in classical music, ballet and opera. This is supported by quality producing and receiving venues giving range and depth to the cultural experience. It is this arts based cultural offer that presents a particularly strong opportunity supported by the area's strong heritage credentials particularly its industrial heritage.

Many cities have also invested in one-off itinerant major events in the sporting field such as the Commonwealth Games or the Ryder Cup, and cultural events such as hosting the Turner Prize or one-night MTV awards. These events can provide a catalyst and harness effort, attract new audiences and provide valuable media profile. Such events clearly have value but they are expensive to deliver and do not belong to the place. Therefore it is more sustainable to focus on existing venues and annual or biennial festivals to build the reputation of a place and which can underline and help develop what is distinctive and special about the area. Such festivals can also engender local pride.

There are two cultural strands to the VES - more effective positioning and marketing of Greater Birmingham's cultural offer; and support, development and promotion of a series of signature festivals over the lifetime of the strategy. These activities do not preclude investment in new cultural venues but given the potential of the existing offer, it makes sense to focus on making that perform better.

EFFECTIVE MARKETING

Effective marketing of Greater Birmingham's culture will support the Going Global pillar by strengthening international positioning with target markets add value to Greater Birmingham's inward investment credentials and strengthen its reputation as a quality place to live. It will help realise the return on investment in the product and programming.

To make Greater Birmingham synonymous with cultural experiences will require a sustained marketing effort which brings together what is currently a fragmented offer into a core strand of destination branding. While the lead offer should focus on where the area stands out - i.e. the

CASE STUDY 4: EUROCHOCOLATE, PERUGIA

Perugia is a historic Italian walled city distinguished by its chocolate festival - EuroChocolate. Running since 1993 it arose from Perugia being home to the chocolate brand 'Perugina' (now owned by Nestle)

Exploiting the mass appeal of chocolate the festival generates numerous creative opportunities for the 1 million visitors each October. They come who come to sample and buy chocolate and enjoy art displays - including the giant sculpting competition - gourmet tastings, street markets, street performances and cultural events.

EuroChocolate has become a commercial concern running chocolate festivals in other Italian cities and more recently franchising a chain of chocolate shops' 14 'chocostores' were opened in Italy last year and one in Beijing with more global openings planned.

The tourism sector in Perugia has responded with a 'Chocohotel' and chocolate spas'



classical offer in Birmingham and the visual arts in a number of locations across Greater Birmingham and the Black Country - the claim can be extended and enhanced through including other venues and programmes. It will be underpinned and delivered by high quality, innovative programming.

The cultural offer fits both the Enlightenment and the Entertainment themes and can be used in both.

FESTIVALS

Festivals are one of the most important parts of the visitor offer because at their best they:

Draw people to a place they might not otherwise consider

- Provide a compelling reason to visit 'now'
- Encourage regular repeat visits
- Present unique experiences only available within that place
- Encourage collaboration and partnership within an area
- Can demonstrate economic impact and return on investment
- Provide PR opportunities, news stories and images

To deliver these benefits festivals have to be of the highest quality and showcase what is special about a place.

The examples are many: 'festival cities' such as Edinburgh, Salzburg and Montreal have effectively demonstrated these benefits through an extensive festival offer, Manchester has delivered its brand promise of 'original modern' with its International Festival of original commissions which has garnered considerable acclaim and publicity. Belfast has invested in

CASE STUDY 5: NI2012, NORTHERN IRELAND

Capitalising on a series of high profile events during 2012 - such as the opening of the Titanic visitor attraction, the refurbishment of a number of cultural venues in Belfast and the opening of the Giant's Causeway Visitor Centre - the Northern Ireland Tourist Board and a group of partners decided to take advantage to run a year of celebration i.e. 'NI2012 Our Time Our Place'

They commissioned high profile events (eg the Titanic Belfast Festival), supported the enhancement of existing festivals (the Land of Giants) and attracted one-off itinerant events (MTV awards and the Clipper) to create a nine month programme designed to support the repositioning of Northern Ireland as a destination and encourage reassessment of what it had to offer.

NI2012 achieved a return on investment of £1:£4.78, economic impact of £17.8M and a wider impact on tourism of £42.2M, and PR coverage of £38.5M from 685 visiting journalists.

Another primary aim was to instil civic pride and confidence - and almost three-quarters of residents claimed to feel more proud as a result of NI2102 whether they attended an event or not.

comedy and music festivals as part of its repositioning using the springboard of the NI2102 year of celebration programme of festivals and events.

Stakeholders should initiate, support and develop several signature events capable of delivering these benefits. (A signature event is defined as being intrinsically and creatively linked to the place and capable of attracting visitors from outside the area.) With creativity and imagination - and partnership and collaboration - the whole of Greater Birmingham could exploit the opportunities signature events provide and indeed tie them into wider promotion in other sectors.

This collection of events will be a mixture of current and new festivals celebrated across Greater Birmingham. **Over the next five years, Greater Birmingham should focus on making a small number of festivals truly international.** These festivals need to develop exciting content and be creative in their approach from the venues where they are held to the way they are marketed to attract attention and compete effectively. Partners need to commit over a period of time, recognising that content, audiences and reputation are built up over time. An additional approach is to develop a festival that is year of celebration with a number of strong event hooks and a series of smaller niche programmes. This might use one of the proposed signature events or one of the festival themes as a starting point to build up the concept. It will require strong collaboration, excellent and creative curating and to be well-funded.

<i>Actions</i>	<i>Partners (lead in bold)</i>	<i>Resources</i>
<p>Engaging and mobilising cultural organisations to generate commitment and alignment to vision of ‘cultural showcase’ and initiate joint and individual action</p> <p>Engage with tourism businesses to identify opportunities, e.g. welcome events as part of festival activity</p>	<p>Birmingham City Council (BCC) Marketing Birmingham Cultural organisations/groups in Greater Birmingham</p>	<p>BCC and MB staff</p>
<p>Articulate cultural showcase propositions for different markets/segments drawing on the strongest & most relevant cultural experiences</p>	<p>Marketing Birmingham Cultural organisations</p>	<p>MB staff</p>
<p>Signature Festival Scoping & Feasibility Study to develop 4 signature festivals for Greater Birmingham, capacity, impact, investment required:</p> <ul style="list-style-type: none"> • Existing: International Festival of Glass & Biennale at Stourbridge and Birmingham International Dance • Potential: drawn from existing strengths including: Jewellery/Staffordshire Hoard; Music/heavy metal; Chocolate • Potential: new ideas generation 	<p>Cultural Showcase Development & Delivery Group (see Delivery Structures in Section 9)</p>	<p>ERDF LEP’s Local Authorities Destination Management Partnerships across the region. For example Staffordshire, Worcestershire and Shakespeare’s England</p>
<p>‘Year Of...’ cultural celebration based on one or more of the Signature Festivals</p>	<p>Culture Showcase Development & Delivery Group Cultural Organisations Local Authorities</p>	<p>ERDF Local Authorities Arts Council</p>

8 GOING LOCAL

This pillar has the potential to deliver:

£151m to £305m GVA from increasing the volume and value of domestic day trips

Greater Birmingham VES, Economic Impact, *Regeneris Consulting, June 2014*

The day visitor market is a success story for Greater Birmingham and the Black Country. The strength in the quality and range of attractions is an important component of this success. The day visitor market is important because it delivers year round visitor spend that help support the viability and vitality of attractions, cultural venues, shops and places to eat.

The objective of this pillar is to generate new visits, extend reach and generate additional trade for local tourism businesses within Greater Birmingham and the Black Country helping create a positive cycle of investment and business confidence.

More visitor spend will increase profitability which encourages business investment in facilities, quality and jobs. This creates a positive cycle contributing to inward investment, quality of life and market positioning. It helps to drive up standards and aspirations that can lead to delivering a world-class experience.

Day visitors typically travel 60-90 minutes for a day trip. 65% of day visitors to Greater Birmingham are currently from the West Midlands, but there is still untapped growth potential within the area and from further afield. This further reach day visitor market also offers potential to convert to short breaks.

- 57m day visits per annum across the 2 LEPs
- Together Birmingham and The Black Country receive 68% of all day trips.
- 88% of day visitors were repeat visitors in 2013
- 24% of visitors said that visiting major tourist attractions was their main activity, 8% said visiting Museums, 6% Arts and Culture, 5% Outdoor Attractions

Source : Tourism Strategy for Greater Birmingham and the Black Country - data and intelligence review, Regional Observatory and Marketing

Over 22.5 million live within a 90 minute drive time of Greater Birmingham and the Black Country⁸. That is a substantial day visitor catchment which includes Sheffield to the north and Swindon and parts of Bristol to the south. It extends to Cambridge to the east and the outskirts of Watford.

Overall the catchment has a slightly above average number of people living in comfortable communities⁹ with their families. It is a very large catchment which has considerable competition for leisure spend. To grow market share requires delivering excellent visitor experiences and taking that offer to market in new ways that gets the attention of target markets in a highly competitive marketplace.

Individual high profile visitor attractions and the 'shires' have an important role to play in showcasing the area to day visitors and encouraging more trips. Greater Birmingham and the Black Country has a strong offer that will appeal to day visitors and can achieve quick wins through 'smart' working to attract new and repeat day trips.

The VES themes provide an opportunity to make strong statements about local distinctiveness because each area has particular strengths. By working with others across boundaries on the themes, these strengths can be further boosted to create a stronger critical mass of experiences to take to market.

All places have something to offer in all of the themes and the table below indicates where the particular strengths lie. Individual areas need to determine through collaborative working with partners where they want to focus their efforts to deliver the most visitors and best return on investment.

Destination Management Plans and tourism strategies for destinations within Greater Birmingham and the Black Country play an important role in ensuring ongoing investment in facilities and quality service

⁸ CACI/ACORN 2014

⁹ ACORN category - Comfortable Communities - extract 'these home-owning families, often middle-aged, are living comfortably in suburban and urban locations. They mainly own older, lower priced, three bedroom terraced or semi-detached homes, which they may have occupied for many years. Families might include young children, teenagers or young adults who have not yet left home. These areas will also include some empty nesters. They tend to be employed in a range of middle management and clerical roles or as shop workers and semi-skilled manual workers and overall household incomes are around the national average'.

	Entertainment	Pleasure	Enlightenment	Business
Birmingham	X	X	X	X
Solihull	X	X		X
Black Country	X	X	X	X
South Staffs		X	X	
North Worcs		X	X	

An excellent customer journey at every stage is essential and must be of a consistent high quality across the 2 LEP areas. Going Local is also about ensuring people who live and work in Greater Birmingham and the Black Country are its ambassadors, understand what there is to do, take pride in their area and regard tourism as a career choice with interesting opportunities and potential.

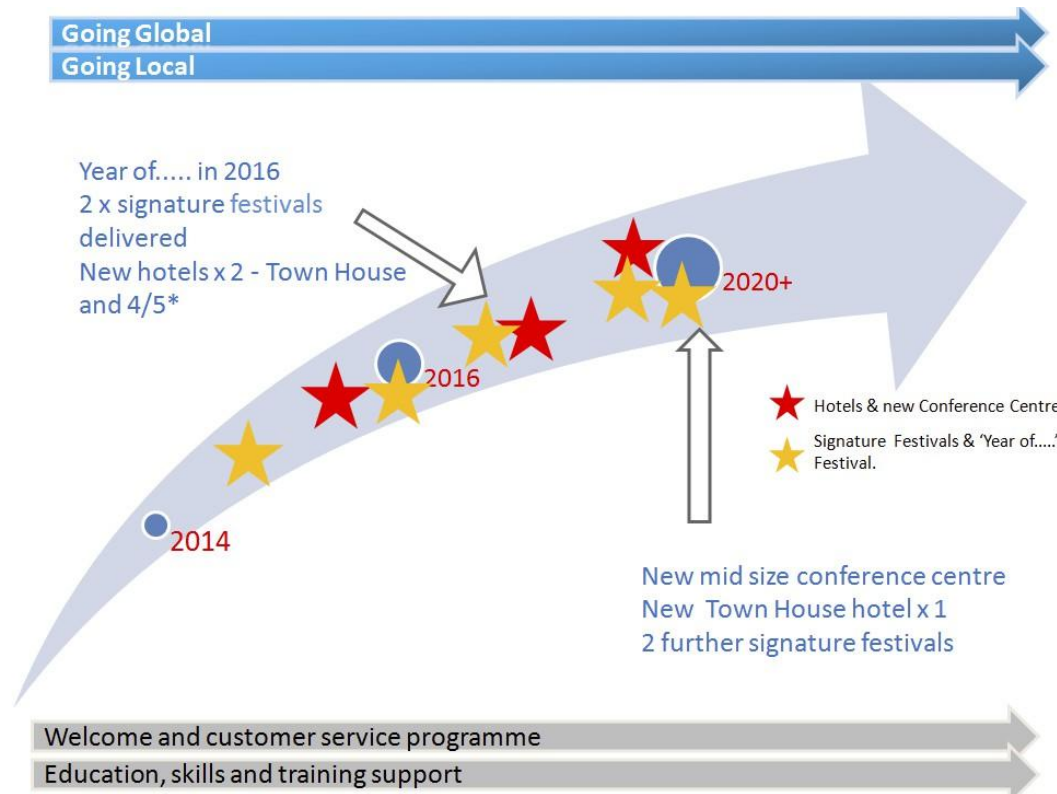
<i>Actions</i>	<i>Partners (lead in bold)</i>	<i>Resources</i>
<p>Develop and deliver Marketing and Communications Plan for day visits - including packaging, using 3rd parties and PR.</p>	<p>Project Development & Delivery Group (see Delivery Structures in Section 9) Marketing Birmingham, DMOs, local authorities visitor attractions, restaurants, cafes, independent shops etc</p>	<p>Coordination of budgets and new commercial activity</p>
<p>Signposting and business support - ensure businesses have access to information and support, e.g. applications for funding Use</p> <ul style="list-style-type: none"> • Case studies • Business mentoring • Workshops e.g. to help smaller attractions unlock the funding available • Information and B2B marketing to encourage visitor attractions, retailers and hospitality sector to invest in customer service training • Communication of market intelligence • Badging of existing schemes to create stronger tourism business packages 	<p>People 1st, Marketing Birmingham, Local Authorities</p>	<p>ERDF and national government</p>

<i>Actions</i>	<i>Partners (lead in bold)</i>	<i>Resources</i>
<p>Customer Journey - welcome & service programme</p> <p>Coordinate existing activity and develop new activity to include:</p> <ul style="list-style-type: none"> • Mapping the customer journey - identify gaps and plan action to address • Align public services • Focus on gateways and points of arrival • Training - World Host, Customer Delight (NEC Group). • Familiarisation trips for local people/ businesses 	<p>Marketing Birmingham, NEC venues, BIDs, universities, transport providers, tourism, retail and hospitality businesses</p>	<p>Align budgets.</p>

9 MAKING IT HAPPEN

Here is the timeline for the VES. It plots key outputs and shows the inter-relationship between delivering actions for the four pillars. It shows ongoing activity that needs to start now and continue throughout the life of the VES and provides indicative points when key outputs will be achieved. Partners will work together to produce a more detailed delivery plan for each pillar as part of delivering the Action Plans.

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DELIVERY

The VES needs leadership and ambassadors to make it happen. That means key stakeholders need to support the VES, recommend it to decision makers and get local businesses to support it.

The VES needs a delivery structure that facilitates action and avoids duplication with existing groups. The following approach is the recommended way forward. An early task is for partners to look at how this delivery structure works with existing groups to determine how best to deliver alignment and drive action.

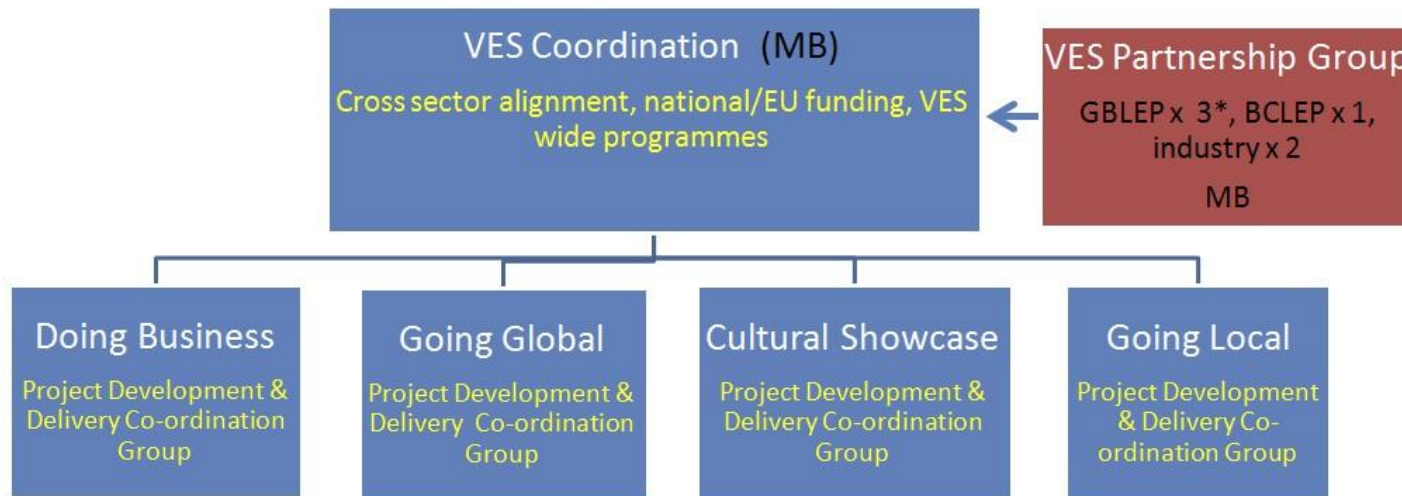
Marketing Birmingham will be responsible for strategic co-ordination of the VES including overseeing cross sector alignment, VES-wide projects and submitting bids to secure European and national funding to help deliver the VES and managing successful bid programmes.

A VES Partnership Group will act as an advisory and oversight group, representing the interests of the geographical area of the 2 LEPs and industry. Membership will be drawn from Head of Economic Development and Senior Manager or equivalent for industry representatives. This level of membership will ensure the group has the cross-sector and strategic understanding and connections to steer the work of the VES effectively. This group will meet twice a year to review progress.

Four Project Development & Delivery Coordination Groups will be established - one for each pillar - the members of these groups will be responsible for project development and overseeing delivery either directly or through other existing groups, depending on the nature of the project/programme. They will be responsible for monitoring outputs and working up annual funding programmes. On occasions a Group may agree to channel funds and responsibilities for a particular delivery project to a third party e.g. Cultural Board, Chinese Association, DMP. There will be an annual review of progress carried out by each Group, which can be used to fine-tune work programmes as necessary.

Each Group will comprise a mix of industry and local authority officers and Marketing Birmingham. The balance of public and private sector membership will be 50:50 and DMPs will be represented through this membership. On establishment each Group will consider any additional organisations that should be invited as members. A maximum of 3 additional members will be permitted to keep each Group small and focused. The additional members would retain the 50:50 public/private sector balance. The objective is to foster relationships wider than traditional visitor economy partners, to engage with partners elsewhere in the West Midlands and to help connect the visitor economy more strongly with other sectors at a delivery level.

In addition, each pillar Group may choose to co-opt other members on a project or programme basis, as required, e.g. educational sector, additional industry representative. Each pillar group will report back to Marketing Birmingham quarterly on progress and their reports will be fed into the quarterly progress meetings Marketing Birmingham will have with the VES Partnership Group. On occasions the Partnership Group may request one of the pillar groups to present to them on a particular project/ programme. Local DMPs will seek to align their actions and activity with the VES as appropriate.



Representatives from Birmingham & Solihull,
N. Worcestershire, S. Staffordshire

MB = Marketing Birmingham

Disclaimer: All information and analysis supplied by Blue Sail Consulting Ltd and our sub-contractors is done in good faith and represents our professional judgement based on the information obtained from the client and elsewhere. The achievement of recommendations, forecasts and valuations depend on factors beyond our control. Any projections, financial or otherwise, in this report are only intended to illustrate particular points of argument and do not constitute forecasts of actual performance

Visitor Economy

6th October 2015

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Developing a Vibrant City



Strategic Fit

Page 61

Our Corporate Plan

Working as one to serve our city

Place Stronger Economy

Delivering effective core services that people want

An environment where new and existing businesses thrive

People develop the skills to get and keep work

Keeping the city clean
 Keeping the city moving
 Improving the city housing offer

Developing a vibrant city
 Supporting businesses, encouraging enterprise and attracting inward investment

Improving our critical skills and employability approach

People Stronger Communities

People live longer, healthier lives

Adults and children are supported in times of need

People and communities achieve their full potential

Promoting and enabling healthy lifestyles
 Promoting independence for older people
 Promoting independence for people with disabilities

Safeguarding people in vulnerable situations
 Strengthening families where children are at risk

Challenging and supporting schools to provide the best education for children and young people
 Enabling communities to support themselves
 Keeping the city safe

Confident, Capable Council Stronger Organisation

Future Council - stronger council ready and able to deliver change



Strategic objectives for the visitor economy

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Position and perception of the city

A key role to play in increasing footfall

Pathways to learning

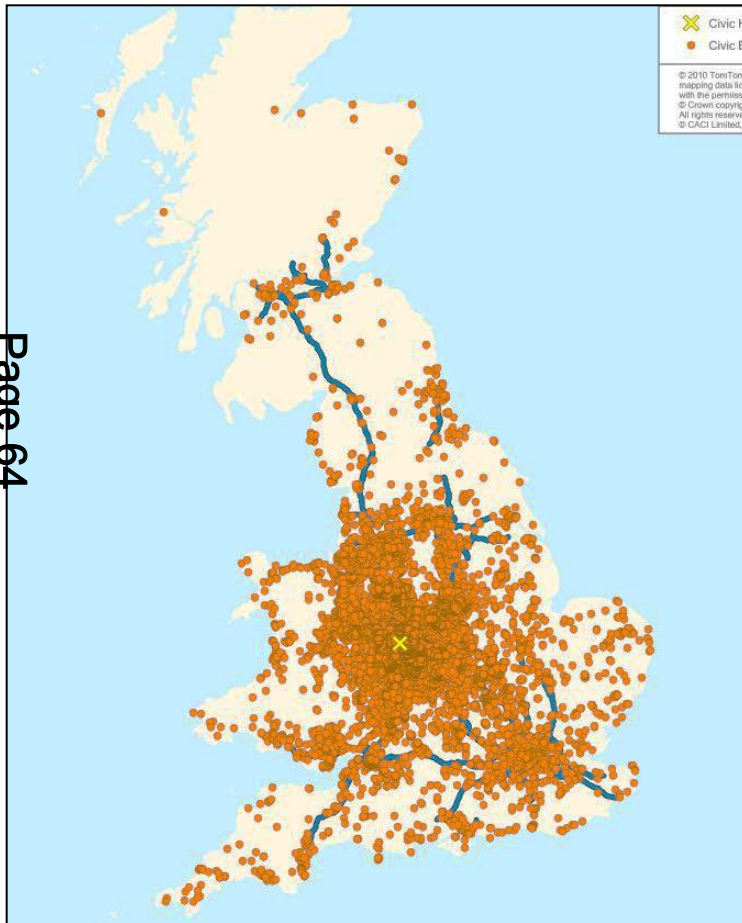
Responding to change with a different business model

Adding value, quality of life – vibrancy

Performance Measures:

- Number of visitors to city's main cultural venues
- Number of businesses supported. (Civic Halls Improvement Plan)
- Number of people accessing the creative economy, learning, training & volunteering opportunities

Audience Reach



Ticket buyers for Wolverhampton's Civic & Wulfrun Halls in 2011

Each orange dot represents a
ticket buying household (UK
audience only)

**22% of the audience came from WV
postcodes, 78% did not**

Surveyed audience for 'Hiroshige' exhibition City of Wolverhampton Art Gallery – September 2015



Employment, Skills and Learning

2014/15 highlights

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7,500 school
pupils visits

92 FE students
taught on site

286 volunteers
recruited

Supports over
700 jobs in
Wolverhampton

The Integration of services

A new **regime of positivity and can-do attitude**

Moving away from the traditional cultural offer to a more improved **local community** offer balanced with **proactive commercial activity**

Balancing commercial and grant funded income streams

SWOT Analysis – Strengths

Strong local knowledge, market understanding, networks, partnerships and relationships.

Over 1million cultural visitors in 2014-15 (Civic & Wulfrun Halls, Grand Theatre, Art Gallery, Slade Rooms, City Economy Events, Bantock)

Page 68
Strong concentration of attractive venues within the city centre generates footfall

Location - strong transport networks within a large, densely populated catchment area

Additional complementary cultural offer i.e. Dunstall Racecourse, Molineux, Wolverhampton Speedway, Wightwick Manor, Moseley Old Hall, All Nations Church, Monmore Green Stadium

Supporting a broad education, learning and training offer

SWOT Analysis – Weaknesses

Complementary offer and perceptions of parking / hotels / restaurants

Recent fall in attendance at some sites (though now stabilising and likely to achieve an upward trend)

Inappropriate skills base for the new market – need for training

Council is changing fast, new systems not fully understood and fully utilised

Old buildings that are not necessarily that flexible for the diversification being planned

Inconsistent visitor offer – needs orientating towards the new market plan

SWOT Analysis – Opportunities

Effective use of modern publicity methods and data collection to cross market and draw in new audiences

Development of new markets by creating a programme of activity that sits alongside commercial activity

Need to reevaluate operating methods and hours in light of budget pressure and market need

Expansion of education, learning and training offer

Collections – presents opportunities for new forms of lending and a more exciting exhibition programme

Develop events across all sites, presenting in different contexts, e.g. piano recitals at the gallery

Development of visitor welcome – a joined up approach to visiting and bringing business to our city

Partnership working, e.g. University of Wolverhampton, rotary, temples, commercial partners

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SWOT Analysis – Threats

Temporary closure of Civic & Wulfrun Halls poses a risk in business continuity

Threat of closure of Bilston Craft Gallery and Slade Rooms

Inconsistent approach to staff development

Over-reliance on key members of staff

Competition for increasingly limited public sector funding

Competing offers in London, Birmingham etc – competition known and unknown

Broader lack of an understanding of the role of visitor economy & cultural services in economic development - business opportunities and jobs

Changes in legislation, e.g. new Licensing Laws completely changed the Civic Halls' business model

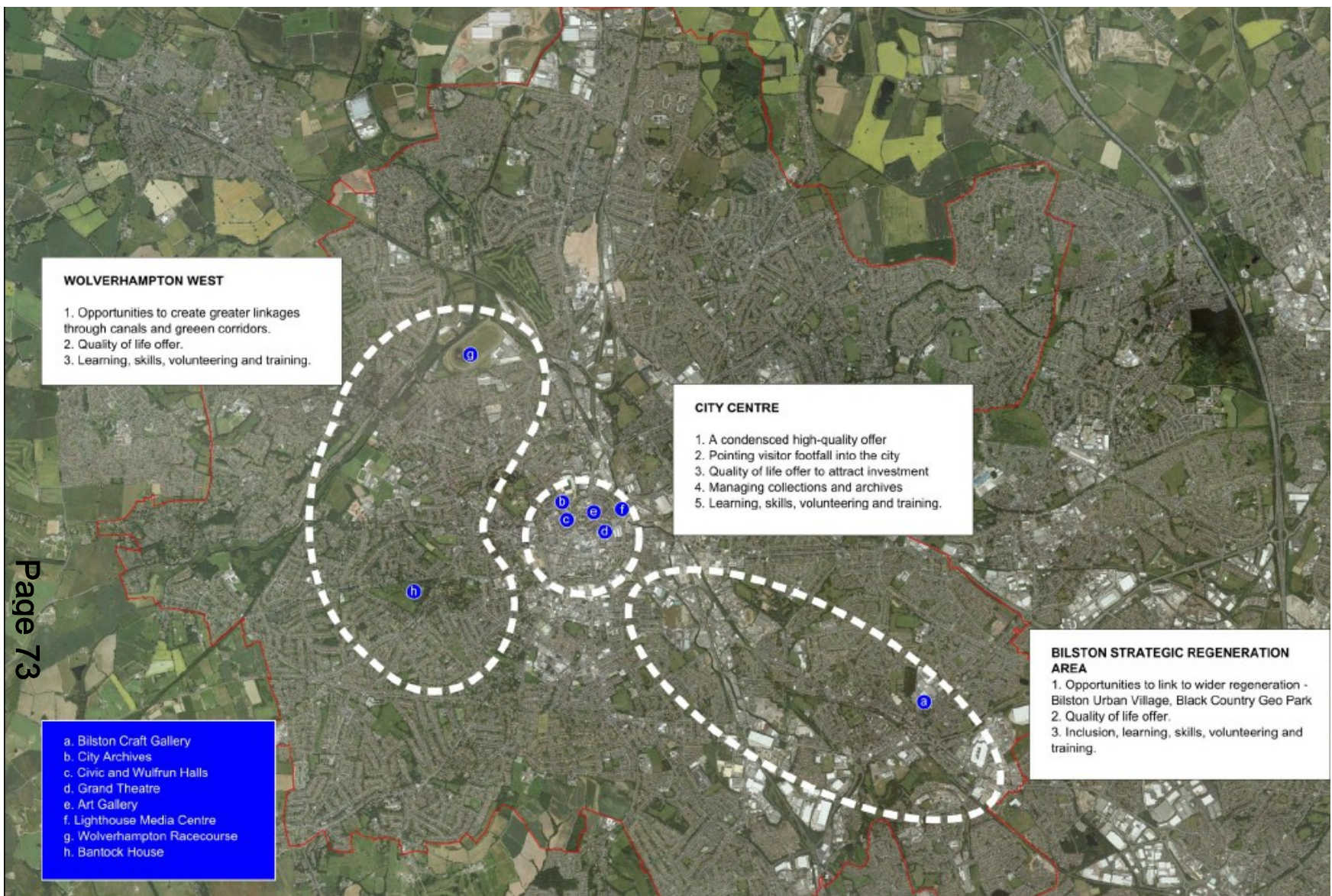
Savings – progress with agreed approach

Remove all subsidies from Council entertainment venues managed by third parties *Progress to date:* effective management of third party relationships to achieve target without closure of venues. £400K one off grant secured for Grand Theatre

Secure and manage a major external investment in the Civic Halls, in order that the Civic Halls become a net contributor to the Council 's cultural and visitor economy services. *Progress to date:* on target, will be fully achieved 2018

Keep remaining venues open, whilst substantially reducing costs to the council, and make a significantly greater contribution to economic objectives e.g. promotion of the city to attract inward investment, greater opportunities for local people to gain skills and enter pathways to employment, improve footfall – particularly in the city centre.

Progress to date: On track to meet all agreed targets



Bantock House Complex

2014/15 Achievements

- Changing the market position of the house to incorporate the park offer
- Increased net café income
- Increased attendance
- Community inspired events – less reliance on council officers and funding
- Net 2014/15 costs £134k – net 2016/17 cost £77k – decrease due to staff redundancy, steady hire fees and sales.

2015/16 Objectives

- To popularise the programme and further change the market position
- To develop and expand commercial activity to maximise income streams
- To develop the learning offer so the venue becomes a place of choice for schools, training providers and businesses

City of Wolverhampton Art Gallery

2014/15 Achievements

- An Arts Council National Portfolio Holder venue = access to grants
- Attendance of 146,088
- 7,422 children and young people educated on site
- 43 collections loans to international museums
- Net 2014/15 cost £882k – Net 2016 /17 £599k – decrease due to phase 1 & 2 restructure, hall hire and sales increases

2015/16 Objectives

- Balance popular programme v's Arts Council requirements
- Improve the offer to key audiences
- Further increase commercial income and reduce costs to reduce reliance on subsidy
- Capitalize on quality of venue as part of inward investment and quality of life offer

City of Wolverhampton Archives

2014/15 Achievements

- Attendance of 12,000 est.
- Funding secured to explore Express and Star photography archive
- Net 2014/15 cost £178k – Net 2016/17 cost £117k – decrease due to a steady increase in hire of facilities

2015/16 Objectives

- Increase/maximise footfall & diversify audience
- Broaden the offer of Molineux House
- Meet legal requirements including successfully achieving archives accreditation
- Develop major imagery project in partnership with the Express and Star Maximise footfall

Civic & Wulfrun Halls

2014/15 Achievements

- Attendance of 221,000
- High number and diversity events
- Change of marketing position from a programme dominated by dance events to one dominated by comedy, on reduced staffing levels

2015/16 Objectives

- To meet the breakeven target in 2021
- To deliver on the outputs of the Civic Halls Improvement Plan
- To develop new markets and change market position
- To deliver a high standard of service for a reduced cost
- To contribute to reputation and footfall in the city

The Slade Rooms

2014/15 Achievements

- Attendance of 25,459
- 65 FE Students taught on site
- Increase diversity of events

2015/16 Objectives

- To renegotiate the rental agreement
- Broaden audience reach and market position
- To meet the breakeven target of 2017 and contribute to below the line costs
- To deliver a high standard of service
- To continue to develop the education offer on site

Bilston Craft Gallery

2014/15 Achievements

- Development of consultation programme on the service
- A fully booked 'craftplay' programme for 0-2 year olds
- Attendance of 14,440
- Net 2014/15 cost £181k – Net 2016/17 cost £64k

2015/16 Objectives

- Maintain a high quality contemporary craft programme in Bilston and neighbouring wards
- To contextualise the current offer within local market need
- Contribute to city-wide visitor offer
- Investigate the viability of a new arts facility in Bilston

City Economy Events Programme

2014/15 Achievements

- Responsibility for administration Parks events by third parties handed over to visitor economy
- Initial partnership working to deliver future events i.e. Racecourse

2015/16 Objectives

- Coordinated events offer across all sites
- Geographical approach to city events – West, City Centre and East
- Prioritise remaining outdoor events budget
- Maintain commercial approach and enabling role in events, e.g. Racecourse bonfire if successful

Next Steps

A new business model

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Change is being driven by a reduction in funding, but also the fact that society is changing at a huge rate and expectations are rising given the competition we're up against



BBC Flog It

Join us on 14 October for a valuation day for the BBC's popular TV programme. -



Drop in for coffee >



MEET ME @WAG 30 Sep >

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