

BLUE SAIL ▶

VISITORS PLACES DESTINATIONS

GREATER BIRMINGHAM and BLACK COUNTRY VISITOR  
ECONOMY STRATEGY  
2014-2020

REPORT FOR MARKETING BIRMINGHAM

AUGUST 2014

# CONTENTS

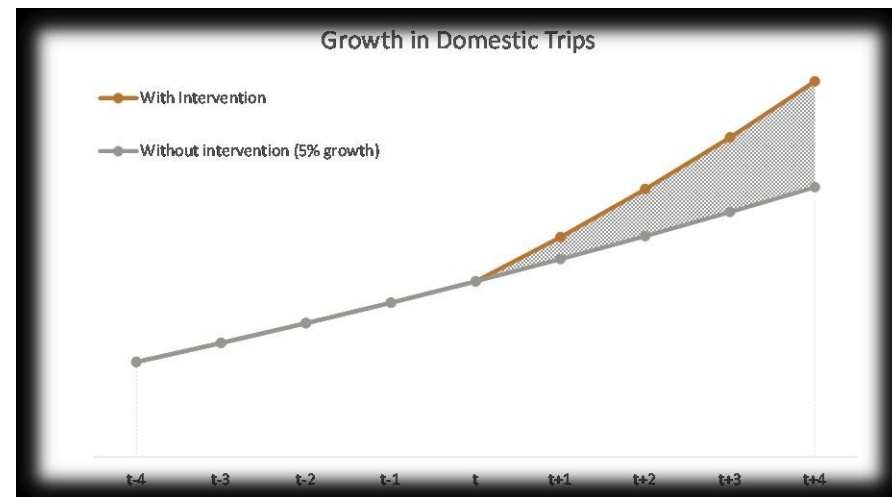
1	EXECUTIVE SUMMARY .....	3
2	INTRODUCTION.....	5
3	WHERE WE ARE NOW .....	8
4	MAKING A DIFFERENCE .....	12
5	DOING BUSINESS .....	17
6	GOING GLOBAL .....	22
7	CULTURAL SHOWCASE.....	28
8	GOING LOCAL .....	33
9	MAKING IT HAPPEN.....	38

# 1 EXECUTIVE SUMMARY

This Visitor Economy Strategy (VES) is about the tourism stakeholders in the Greater Birmingham & Solihull and the Black Country LEPs<sup>1</sup> 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 21<sup>st</sup> century, by targeting and



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

<sup>1</sup> 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

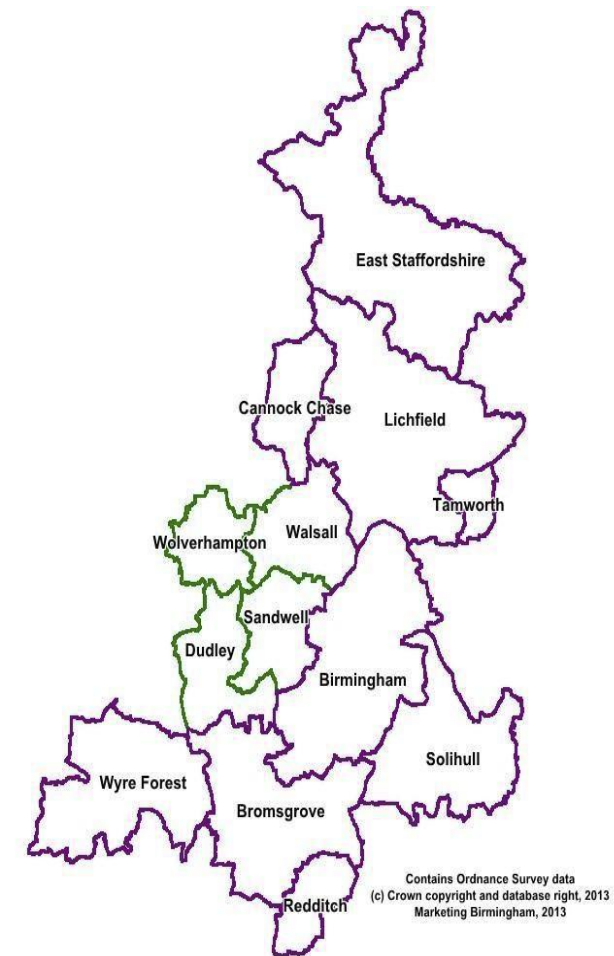
This is a Visitor Economy Strategy (VES) for the two LEP areas of Greater Birmingham & Solihull and The Black Country.

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.

**WORKING PAPERS DEVELOPED FOR THE STRATEGY**

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

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.

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 2<sup>nd</sup> 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

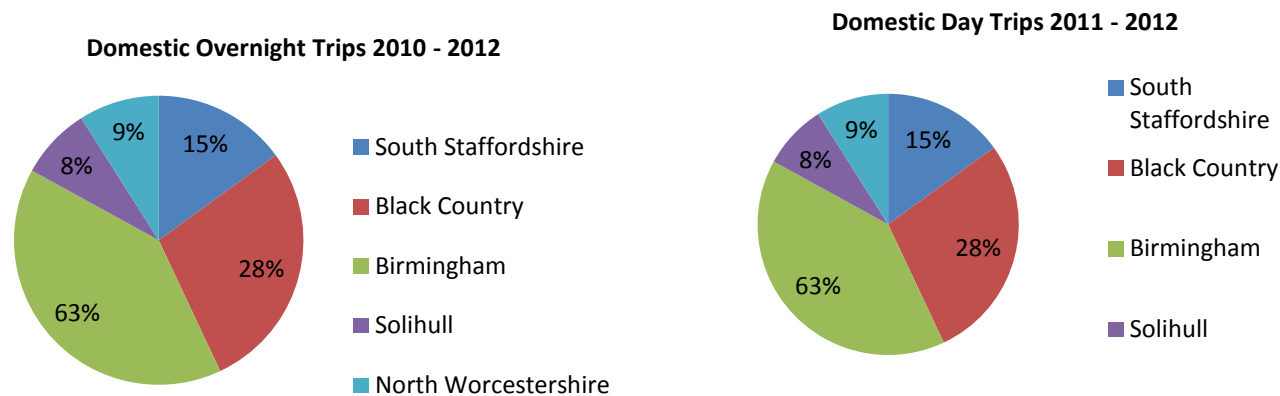
Greater Birmingham needs to be resourceful and to present a strong confident place that will encourage private sector investment in new tourism product and look at new private sector-led ways to support revenue funding the visitor economy. The proposed TBID for Birmingham is one such opportunity and 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

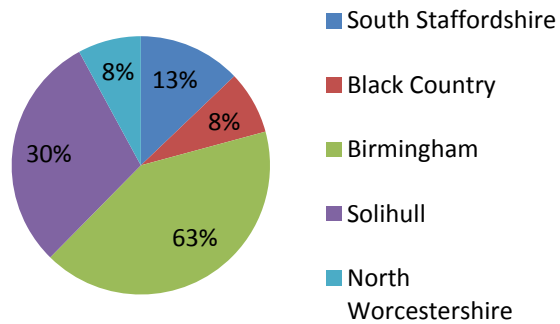


REVENUE FROM OVERNIGHT VISITORS PER HEAD OF POPULATION	
Birmingham	£892
Solihull	£1,456
Black Country	£226

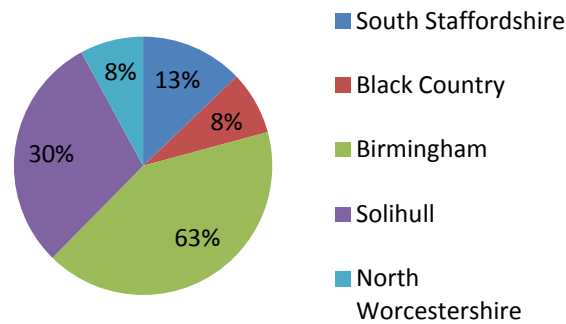
SHARE OF GVA & TOURISM GVA

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

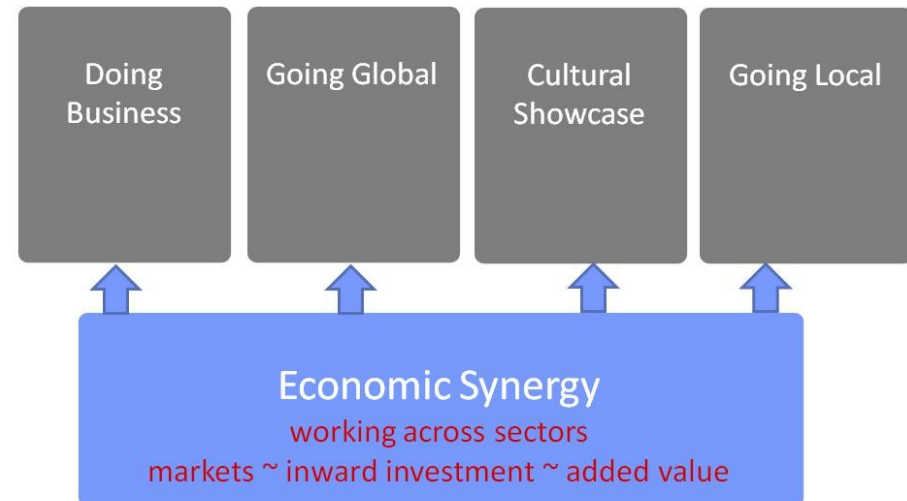
VisitEngland's target is to grow tourism in England by 5 per cent on average year on year over ten years to 2020. For Greater Birmingham and the Black Country to outperform its competitors, it will need to deliver a higher annual growth than the national average. This strategy has based growth predications 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 expenditure<sup>2</sup>**.

## 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.

---

<sup>2</sup> 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"> <li>•Festivals</li> <li>•Performances</li> <li>•Attractions</li> <li>•Sport</li> </ul>	<ul style="list-style-type: none"> <li>•Shopping</li> <li>•Eating</li> <li>•Strolling</li> <li>•Socialising</li> <li>•Enjoying the countryside</li> </ul>	<ul style="list-style-type: none"> <li>•Galleries</li> <li>•Museums</li> <li>•Heritage</li> <li>•Knowledge</li> </ul>	<ul style="list-style-type: none"> <li>•Conferences</li> <li>•Meetings</li> <li>•Exhibitions</li> </ul>

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.

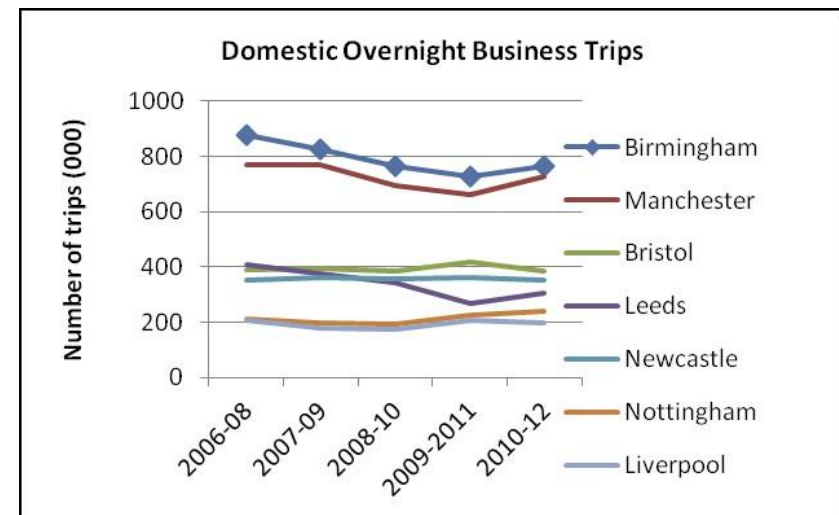
Greater Birmingham and the Black Country has a thriving business tourism infrastructure including the showcase venues of the NIA, NEC and the ICC.

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 21<sup>st</sup> 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 centres<sup>3</sup>.

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 selection<sup>4</sup> 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 (42<sup>nd</sup>), Glasgow (35<sup>th</sup>), Liverpool (71<sup>st</sup>) and Birmingham (89<sup>th</sup>)

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

<sup>3</sup> Meetings, Incentives, Conferences and Meetings Paper, Blue Sail

<sup>4</sup> 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 activity<sup>5</sup>. 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

<sup>5</sup> Opportunities for Growth in the UK Events Industry, Business Visits & Events Partnership, 2011

#### CASE STUDY 2: BERLIN

Berlin is 3<sup>rd</sup> 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 1<sup>st</sup>’ - 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><b>Create joined up sales force for conferences and exhibitions</b> - audit opportunities; target, map and plan national/international opportunities; develop inclusive packages. Build marketing capacity over time</p>	<p><b>Marketing Birmingham, NEC venues,</b> Universities and other large venues</p>	<p>Align budgets. Prioritisation and coordination of activity</p>
<p><b>Position Greater Birmingham as a centre of excellence to study and develop a career in the conference, exhibition and events sector</b> 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><b>Sector Skills Council e.g. people 1<sup>st</sup>,</b> industry, universities, colleges, trade associations, LEP Employment and Skills Board</p>	<p>ERASMUS EU Funding, National Programmes</p>
<p><b>Invest in a wider choice of hotels</b> - 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><b>Marketing Birmingham,</b> 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
<b>Germany</b>	Current significant market, good market share, economic priority, air links
<b>France</b>	Current significant market, economic priority, good growth rates, air links
<b>USA</b>	Current significant market, economic priority, good growth rates, air links
<b>Australia</b>	Current significant market, West Midlands performs well, economic priority, good growth rates
<b>India</b>	Current market, West Midlands good market share, economic priority, Air links and more planned
<b>China</b>	Economic priority, good growth rates, planned air links

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.<sup>6</sup> Marketing activity will be determined by resources available.

<sup>6</sup> 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><b>Develop bespoke campaign plans for each country market</b> 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><b>Deliver series of creative campaigns</b> designed to build awareness and grow international staying visits and spend.</p>	<p><b>Marketing Birmingham</b></p>	<p>Marketing Birmingham (MB) time</p>
<p><b>Develop strong travel trade relationships in UK and on-territory</b> to establish Greater Birmingham proposition and product</p>	<p><b>Marketing Birmingham</b></p>	<p>MB time</p>
<p><b>Partnership and Alignment</b> - 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><b>Marketing Birmingham</b>                      VisitBritain/VisitEngland                      Destination Management Organisations (DMOs) &amp; local authorities                      Tourism businesses                      Airport                      Transport carriers                      Universities                      Regional companies with strong international brands</p>	<p>MB time                       ERDF                      LEPs                      Businesses</p>
<p><b>Work towards delivering an outstanding welcome and cultural understanding</b> - Improving capacity and capability of visitor economy businesses to meet needs of priority markets - market briefings, seminars, workshops, cultural training etc</p>	<p><b>Marketing Birmingham</b>                      Trade associations                      People 1st                      DMOs &amp; 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*

7

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*).

<sup>7</sup> 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><b>Engaging and mobilising cultural organisations</b> 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><b>Birmingham City Council (BCC)</b> Marketing Birmingham Cultural organisations/groups in Greater Birmingham</p>	<p>BCC and MB staff</p>
<p><b>Articulate cultural showcase propositions</b> for different markets/segments drawing on the strongest &amp; most relevant cultural experiences</p>	<p><b>Marketing Birmingham</b> Cultural organisations</p>	<p>MB staff</p>
<p><b>Signature Festival Scoping &amp; Feasibility Study to develop 4 signature festivals for Greater Birmingham,</b> capacity, impact, investment required:</p> <ul style="list-style-type: none"> <li>• Existing: International Festival of Glass &amp; Biennale at Stourbridge and Birmingham International Dance</li> <li>• Potential: drawn from existing strengths including: Jewellery/Staffordshire Hoard; Music/heavy metal; Chocolate</li> <li>• Potential: new ideas generation</li> </ul>	<p><b>Cultural Showcase Development &amp; Delivery Group</b> (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><b>'Year Of...' cultural celebration based on one or more of the Signature Festivals</b></p>	<p><b>Culture Showcase Development &amp; Delivery Group</b> 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 Country<sup>8</sup>. 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 communities<sup>9</sup> 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

---

<sup>8</sup> CACI/ACORN 2014

<sup>9</sup> 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	

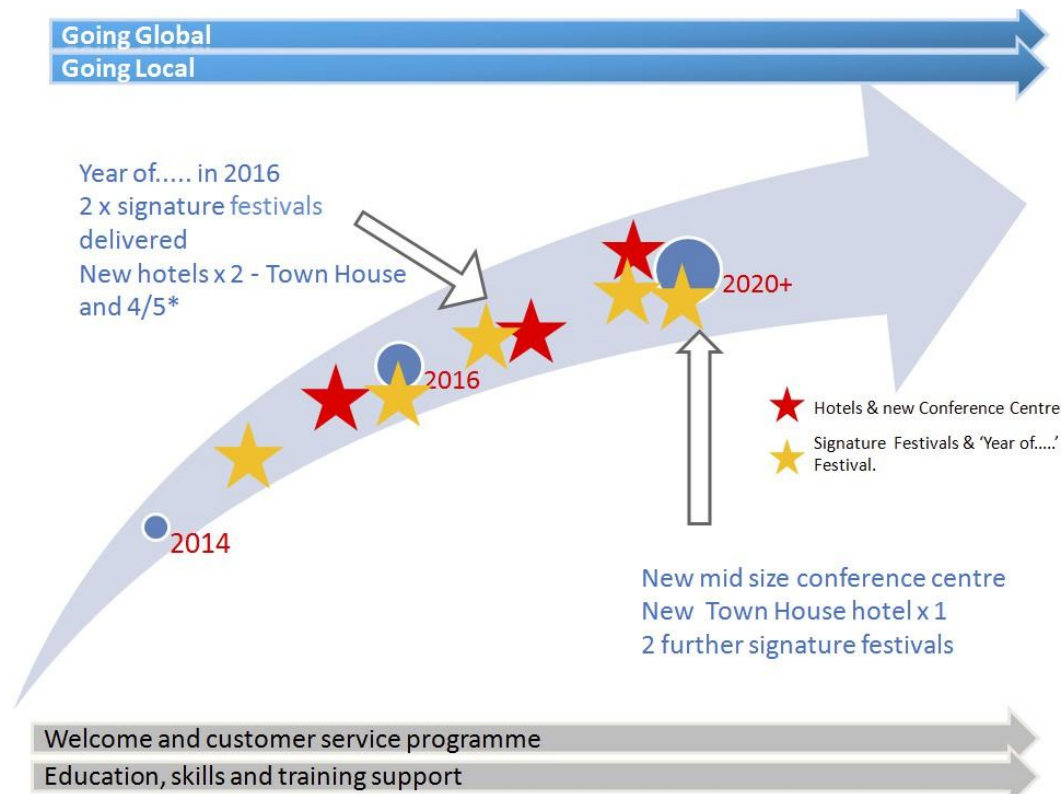
An excellent customer journey at every stage is essential and must be of a consistent high quality across the 2 LEP areas. Going Local is also about ensuring people who live and work in Greater Birmingham and the Black Country are its ambassadors, understand what there is to do, take pride in their area 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><b>Develop and deliver Marketing and Communications Plan for day visits</b> - including packaging, using 3<sup>rd</sup> parties and PR.</p>	<p><b>Project Development &amp; Delivery Group</b> (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><b>Signposting and business support</b> - ensure businesses have access to information and support, e.g. applications for funding Use</p> <ul style="list-style-type: none"> <li>• Case studies</li> <li>• Business mentoring</li> <li>• Workshops e.g. to help smaller attractions unlock the funding available</li> <li>• Information and B2B marketing to encourage visitor attractions, retailers and hospitality sector to invest in customer service training</li> <li>• Communication of market intelligence</li> <li>• Badging of existing schemes to create stronger tourism business packages</li> </ul>	<p><b>People 1<sup>st</sup>, Marketing Birmingham, Local Authorities</b></p>	<p>ERDF and national government</p>

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



---

## 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.

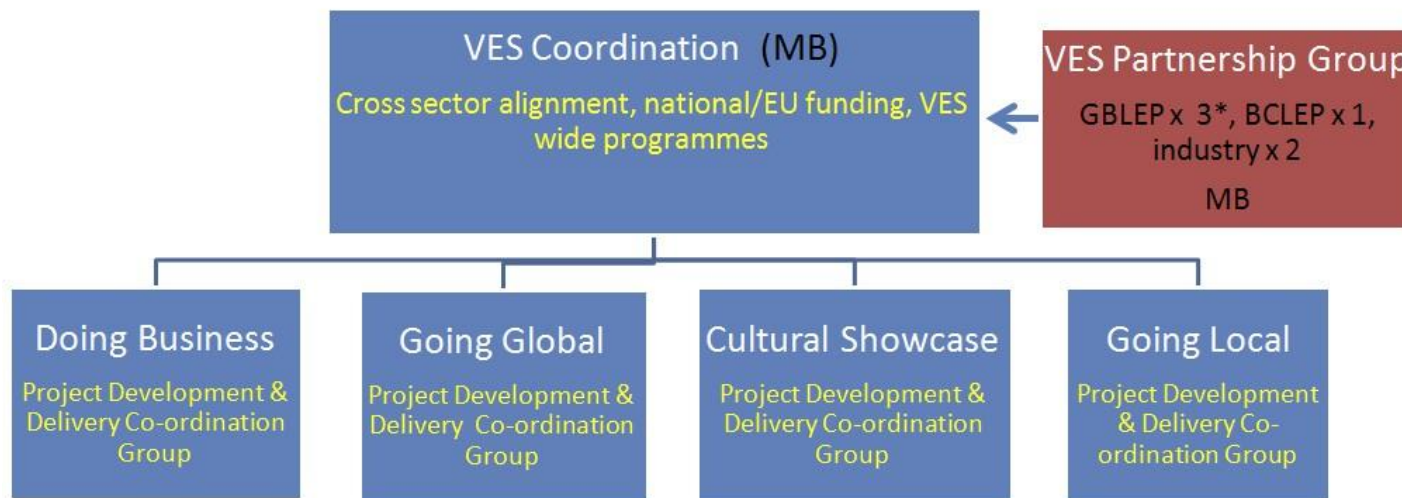
Marketing Birmingham will be responsible for strategic co-ordination of the VES including overseeing cross sector alignment, VES-wide projects and submitting bids to secure European and national funding to help deliver the VES and managing successful bid programmes.

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