



# Stronger City Economy Scrutiny Panel

6 October 2015

<b>Report title</b>	Visitor Economy	
<b>Cabinet member with lead responsibility</b>	Councillor John Reynolds City Economy	
<b>Wards affected</b>	All	
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<b>Report to be/has been considered by</b>		

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## 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.

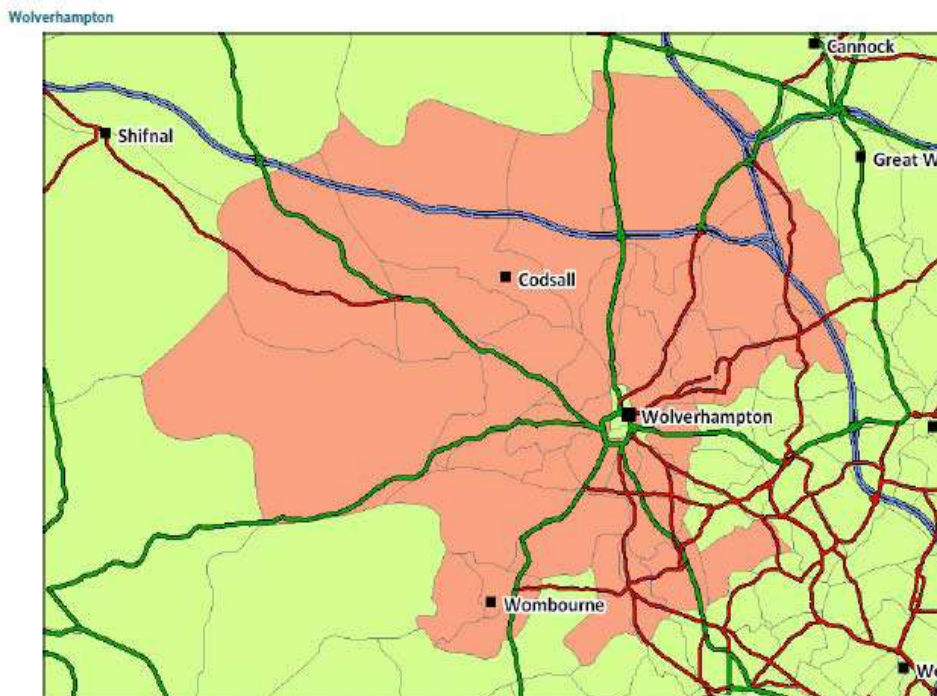
## **2.0 Background**

- 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 69<sup>th</sup> 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 brought 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](http://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.