

## Appendix A: Tourism Growth Plan

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### 1. INTRODUCTION

Hailed as the birthplace of popular tourism thanks to the entrepreneurial activities of local travel pioneer Thomas Cook, Leicester and Leicestershire still recognise the value of the visitor economy almost 180 years on. In 2018 the £1.88bn injected into the local economy by 34.93 million visitors supported 23,076 jobs. The benefits of a thriving tourism industry however are not just economic; they make our area a more attractive place to live, study and do business in. Our rich heritage, beautiful natural landscapes and world-class visitor attractions help create a place that all can enjoy and feel proud of.

Tourism and hospitality is an important economic sector for Leicester and Leicestershire and is recognised as having the potential to become one of the key drivers of the local economy. This plan provides a framework for further sector growth by setting down key priorities, activities and projects that partners and stakeholders collectively feel offer the best prospects to increase the competitiveness of the destination and maximise the wealth it can generate. The plan will focus effort, reduce duplication, inform, guide and influence decisions on investment and bring independent and individual partners together to increase their impact. By visualising and developing the area as a single, integrated visitor destination, we can achieve even more: more growth, more visitors, more economic value and more jobs.

**This is a five-year plan for the destination and all its stakeholders, from those that fund and support it to those who provide the direct visitor experiences in our hotels, attractions, shops and restaurants.**

#### **Vision Statement:**

**We want to become a leading leisure and business tourism destination where visitors are compelled to come and uncover our story, increasing the value of tourism to the local economy to £2.1bn by 2025.**

### Sir Peter Soulsby, City Mayor, Leicester City Council

*Leicester has over 2,000 years of history and a rich cultural and built heritage that we celebrate and cherish. These remarkable assets are designed to be shared and we want to support and encourage more people from outside of our area to explore and discover them and then, whilst they are here, give them a warm welcome and positive experience so they leave with a great impression of our city.*

*Our Tourism Growth Plan will help us all to visualise a better future for tourism; achieved through partnership working and the benefits of a joined up approach. The refreshed City Tourism Action Plan is closely aligned to the strategic priorities established in this document as we see there are benefits to be gained from a more integrated visitor destination with a unified focus. Those benefits we see in increased revenue for the local economy, more opportunities for employment and creating an attractive place for all to live, work and study. We recognise that tourism can also give the area a higher profile and a stronger image, which will support a range of other activity from inward investment to attracting students to our universities.*

### Mr. Nick Rushton, Leader of Leicestershire County Council

*We all have a stake in the area's success as a visitor destination. This plan will help to take full advantage of Leicestershire's many remarkable tourism assets, from the mighty National Forest to a tiny village teashop, and through a shared ambition make the local economy stronger. Tourism does not only help those businesses engaged directly in the industry but in rural areas it also helps to provide and sustain local services and employment. It also provides opportunities for business diversification during times of economic uncertainty and experiences and places for local residents to spend quality time with family and friends.*

*This Tourism Growth Plan provides a framework for those responsible for delivering the visitor experience across Leicester and Leicestershire by establishing clear priorities to focus on, an understanding of what needs to be done to make a difference and how to achieve success. It is a strategic tourism plan designed to help partners to get actively involved in growing the visitor economy yet still giving our districts, market towns and villages the freedom to strengthen their own identities and celebrate their local distinctiveness which will all help to increase our visitor appeal.*

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### 2. THE VALUE OF TOURISM

The economic potential of Leicester and Leicestershire was significantly enhanced by the discovery of the remains of King Richard III in 2012 and his reinterment in Leicester Cathedral in 2015. The value of this remarkable story to the area is not just financial (it brought £54m to the local economy), it provided a spotlight that enabled both the City and the County to showcase the area's rich heritage and tourism potential. The opening of the King Richard III Visitor Centre in 2014, just two years after the initial discovery, along with the multi-award winning Bosworth Battlefield heritage centre, gave the area a focus to share its remarkable, and truly unique, story with the world. The story stimulated a host of new developments; including the popular Story of Leicester heritage programme, an on-street and digital celebration of the City's 2,000 years of heritage. Several years on, the story continues to inspire exciting new initiatives, the latest being the Bosworth 1485 Sculpture Trail.

Not long after the King Richard III story catapulted Leicester and Leicestershire onto the world stage, the City's football team astounded the international sporting community in 2016 by winning the Premier League at odds of 5,000 to 1. It quickly became one of the greatest sporting stories of all time and again the area had the eyes of the world upon it. These two great stories have really helped to make our area both distinctive and memorable. The visitor economy is already showing the benefits, since 2013 there has been an increase of 26.9%<sup>1</sup> in value from the sector, 18.6%<sup>1</sup> increase in visitors and a 12.6%<sup>1</sup> increase in employment. With growth rates above the national average, the visitor economy has a newfound confidence. Proposed new hotel developments in the City could create around 850 new bed spaces for overnight visitors and many of our leading visitor attractions, like Twycross Zoo (now one of the fastest growing zoo and wildlife attractions in England) and the National Space Centre, have multi-million pound growth ambitions. Leicester and the county districts are developing strategies to capitalise on this growing tourism industry, highlighting in particular the economic value of our market towns.

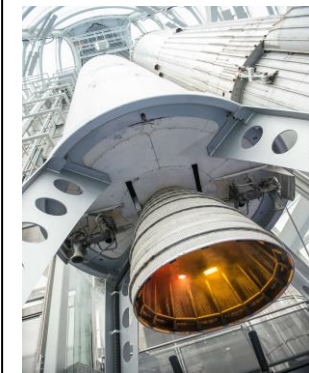
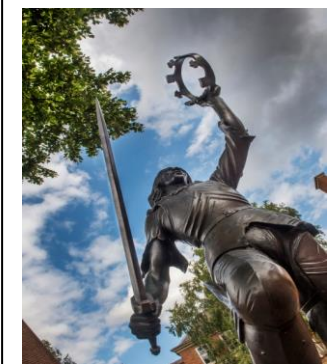
This plan will capitalise on this success and heightened profile to take the visitor economy to the next stage, making Leicester and Leicestershire a leading visitor destination for both business and leisure purposes.

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<sup>1</sup>STEAM Final Trend Report Greater Leicestershire 2009-2018

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## 3. OUR OFFER



Map showing distribution of principal attractions in the sub-region (based on LLEP Leicester & Leicestershire Tourism and Hospitality Sector Growth Plan)

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### OUR TROPHY CABINET



**Dandelion  
Hideaway  
(Osbaston)**

Winner - Visit Britain  
Glamping Provider of  
the Year 2017



**King Richard III  
Visitor Centre  
(Leicester)**

Visit Britain Best  
Told Story Award  
2018



**National Space  
Centre  
(Leicester)**

Winner of UK  
Events Awards  
Unique Venue of  
the Year 2016



**National Forest  
Timber Festival**

UK Festival  
Awards Winner  
Best New Festival  
2018



**Twycross Zoo**

British & Irish  
Association of Zoos and  
Aquariums

*\*Gold* – Exhibit –  
Chimpanzee Eden  
(2018)

*\*Silver* - Animal  
Husbandry, Care and  
Breeding (2017 &  
2018), Education (2017  
& 2018) Exhibit –  
Gibbon Forest (2017)

National Institute of  
Directors – West  
Midlands Director of  
the Year 2016



**Imago Venues  
(Loughborough)**

*M&IT 2019*

Gold– Best Academic  
Venue & Best Food &  
Beverage Supplier

Bronze -Best UK  
Conference Centre

*Academic Venue Awards  
2018*

*\*Best Residential  
Conference Venue*

*\*Best Training Venue*

*\*Best Accommodation*



**Stoney Cove UK  
National Dive  
Centre (Stoney  
Stanton)**

2018 Diver Awards  
- World Dive  
Centre of the Year  
(3rd)



**Round Corner  
Brewing**

Gold – International  
Brewing Awards  
2019



**Bosworth Battlefield  
Heritage Centre**

Sandford Award 2018  
Excellence in Educational  
Provision



**Leicester  
Conferences  
(Oadby)**

MIA Awards –  
Best Team 2018



**Brentingby Gin** – The Gin Guide Awards –  
Writers' Choice Award - Winner 2019

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### 4. WHERE WE ARE NOW? LOOKING AT THE EVIDENCE

This plan has been developed to capitalise on the opportunities, and address the local challenges, that were identified from market intelligence.

#### What we found out:

- ▶ **Day visitors:** The area attracted around 34.9 million visitors in 2018, of which the vast majority (89%, over 31 million) were day visitors.<sup>1</sup>
- ▶ **Overnight visitors:** We welcome 3.76 million staying visitors<sup>1</sup> each year and domestic overnight trips to our area are increasing – from 8.6 million overnight trips in 2009 to 10.7 million in 2018.<sup>1</sup> Whilst overnight trips account for only 11% of visitor numbers, they account for 39% of economic impact.<sup>1</sup> Peak months for staying visitors are December, July and August.
- ▶ **Visiting Friends and Relations:** A high proportion of overnight trips to the area are visits to friends and family (56%)<sup>2</sup>.
- ▶ **Business Tourism:** 19% of domestic overnight trips to our area are for business purposes, compared to the national average of 14%<sup>3</sup>
- ▶ **Jobs:** The visitor economy in 2018 supported 18,103 FTE jobs through direct tourism expenditure and a further 4,973 jobs through indirect tourism revenue<sup>1</sup> – almost as many as the retail sector. The Office for National Statistics (ONS)<sup>4</sup> shows tourism industry employment in our area increased by 35.5% compared to a 20.2% increase in England as a whole between 2012 and 2017.
- ▶ **Tourism enterprises:** The ONS business count data<sup>5</sup> shows that the number of tourism industry enterprises in our area has increased by 18.2% between 2013 and 2018 compared to a 20.2% increase in England as a whole. In a business survey undertaken in 2018, the majority of respondents reported improved business performance compared to 5 years ago and 65% expected performance to be better over the next 5 years. 84% of businesses surveyed were planning for growth.<sup>6</sup>

#### What this data tells us:

- ▶ **Tourism is a growth sector.** The value of the sector, the number of visitors and the number of tourism enterprises in our area are all growing. Local businesses are optimistic about business performance over the next 5 years.

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<sup>2</sup> The GB Tourist 2018 Annual Report

<sup>3</sup> The GB Tourist 2018 Annual Report

<sup>4</sup> BRES. Nomis, 2019

<sup>5</sup> UK Business Counts. Nomis, 2019

<sup>6</sup> Leicester and Leicestershire Business Survey 2018.

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- ▶ **The visitor economy needs to thrive** to maintain its value to the local economy of £1.88bn,<sup>1</sup> support a growing number of tourism enterprises and the 23,076<sup>1</sup> people directly or indirectly employed in the sector.
- ▶ **Leicester and Leicestershire are currently dominated by day trips** because we are within easy distance of a big population. If we are to convert day to stay, we need to attract visitors from a wider geographical area, especially those with easy road and rail links. People travelling longer distances are more likely to stay overnight.
- ▶ **We need to increase the number and value of staying visitors.** Staying visitors have greatest impact on our local economy but account for just 11% of total visitor numbers and we have spare capacity in our serviced accommodation stock.
- ▶ **Local residents need to be tourism ambassadors for Leicester and Leicestershire.** The visiting friends and family market is important and we need to ensure that local people and students at our universities are our tourism ambassadors.
- ▶ **We have a high value business tourism sector to capitalise on.**

We then carried out extensive visitor and non-visitor research, consulted widely with local tourism businesses and undertook desk-based research to find out how we can further unlock the potential of the sector.

### What we found out from visitors and non-visitors:

- ▶ Awareness and understanding of what the destination has to offer tourists, and the perception of the quality of that offer, is a significant barrier to sector growth. Non-visitors are unsure of what is on offer whilst those who have visited are muted in their evaluation.
- ▶ Leicester is recognised for its vibrant cultural diversity and its connectivity (in terms of transport links).
- ▶ There was no strong sense of place for Leicestershire compared to other rural shires, but there was a sense of rural beauty and tranquillity.
- ▶ Individual towns' narratives are not particularly distinctive; they come across as low-key, gentle, familiar and small-scale.
- ▶ Food is a strong theme and Melton Mowbray has the highest food-related profile.
- ▶ Visitors said that a quality shopping offer, centred on independents and markets, would be a particular motivator to visit.

### What we found out from businesses:

- ▶ The main barriers to growth identified by tourism businesses surveyed were: profile of the region as a tourism destination, increased operating costs, increased competition, economic uncertainty and access/parking. There is a feeling that the area needs to crystalize its identity and everyone needs to use it.



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- ▶ Local tourism businesses were asked to select from a list what Leicester and Leicestershire could do better to attract more visitors. 'More/better marketing of the place' was selected by 73% of respondents, followed by 'better transport to and around Leicester and Leicestershire' (61%), 'better signage and visitor information' (56%) and 'events and festivals' (50%).
- ▶ Young people are not drawn to the sector for work. There needs to be more sector engagement in schools to make careers in tourism and hospitality more attractive.
- ▶ Businesses are pro-development but many key attractions are at capacity.
- ▶ Day visitors dominate. Much of the visitor economy is 'local'.

### What we found out from our desk research:

- ▶ The area's waterways (70 miles of water and eight rivers) have untapped leisure potential.
- ▶ In on-line, travel brand and 'official' references to the area, including Google search and social media platforms, there was a lack of a shared place narrative for the wider destination and little use of place by non-tourism organisations, or by visitor attractions themselves.

### What the leisure tourism evidence told us:

- ▶ **We need to establish a clear identity for the area and promote it through a coherent campaign** that is easy to get behind and straightforward for businesses to adopt.
- ▶ **All stakeholders understand that the whole (Leicester + Shire) can be more than the sum of the parts.**
- ▶ **There are some areas of untapped potential** including the waterways, the retail offer, food and drink offer and business tourism.
- ▶ **There are a range of infrastructure challenges** that need to be addressed to underpin the growth of the sector including skills, accessibility and the visitor welcome.
- ▶ **Businesses want to see a shift from reliance on local day visitors.**

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### Audience research

Research told us the following audience segments, based on established Visit England leisure visitor segmentation models, are the closest fit to our existing tourism offer. The Free & Easy Mini-Breakers (a younger segment open to ideas and inspiration) are a less well-developed segment for us and provide good future growth opportunities. Focusing on these audiences will help to guide and inform our marketing and product development.

Empty-nester couples with traditional values	Active Family Fun Seekers	Free & Easy Mini-Breakers
<ul style="list-style-type: none"> <li>➤ Older generations who appreciate heritage and culture – over 50s</li> <li>➤ Mid levels of affluence - but with fewer, if any, family members to cater for when on holiday</li> <li>➤ Keen to be guided and explore city, towns and countryside</li> <li>➤ Enjoy short breaks in the UK that offer a wealth of cultural experiences, connections to the country's heritage and countryside</li> <li>➤ Interested in learning about heritage, industry and culture of place</li> <li>➤ Eating, drinking, socialising is an important part of the experience – particularly local produce</li> <li>➤ Higher than average consumption of broadsheets and UK tourism websites</li> <li>➤ Want things to be easy and no hassle</li> <li>➤ Will come for day and overnight trips, linking with heritage and cultural events and festivals</li> <li>➤ Good quality, secure accomodation is important when booking a holiday</li> </ul>	<ul style="list-style-type: none"> <li>➤ Families and groups of families with kids under 16</li> <li>➤ Multi-generational and blended families</li> <li>➤ Mid levels of affluence – but prepared to spend and treat themselves when they are on holiday</li> <li>➤ Want lots to do – whatever the weather</li> <li>➤ Particularly interested in visitor attractions, activities, events</li> <li>➤ Interested in learning too – but in stimulating, fun, interactive ways</li> <li>➤ “If kids are happy we are happy”</li> <li>➤ Eating, drinking, socialising is an important part of the experience</li> <li>➤ Interested in both city and rural areas</li> <li>➤ Will come for day and overnight trips as well as visiting friends &amp; relatives, depending on their particular circumstances</li> <li>➤ Motivated by family-orientated experiences, accommodation and activities</li> <li>➤ Want ideas and inspiration</li> </ul>	<ul style="list-style-type: none"> <li>➤ Typically younger – under 35s</li> <li>➤ Enjoy travelling – solo, couples, groups</li> <li>➤ Mid levels of affluence and enjoy spending on themselves</li> <li>➤ Want lots to do – like to cram as much into a break as possible</li> <li>➤ Up for activities – like to give things a go – “You only live once”</li> <li>➤ Social experiences really important</li> <li>➤ Sense of place important - get to know the place</li> <li>➤ Interested in insider tips – “live like a local”</li> <li>➤ Want things to be easy and no hassle</li> <li>➤ Want experiences to share and ideally brag about</li> <li>➤ Most likely to base themselves in the city – but will travel out for the right experience</li> <li>➤ Will come for overnight stays</li> <li>➤ Visiting friends is an important sub-segment</li> <li>➤ Events (festivals, music, sporting &amp; cultural) are a particular motivator to “come-now”</li> </ul>

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Next, to future proof our tourism industry, we undertook research into domestic and international leisure tourism trends using Visit Britain sources.

### Our research told us:

- ▶ People are looking for new, attractive places that are easy to get to when they take a leisure trip. They are attracted to destinations with high quality eating and drinking, and to hotels offering accommodation deals.
- ▶ Visitors want to be seen as temporary locals seeking emotional connection to a shared experience. People are searching for authentic, often bespoke, experiences and local knowledge to make their visit memorable, rather than just what they can visit.
- ▶ There is a trend for staycations with the value of the pound weak.
- ▶ There is continuing popularity for short breaks, with more people taking more breaks more often.
- ▶ Digital technology is everywhere and always on. It has transformed how visitors search, plan and book trips and how visitors communicate and find information during their stay. Sharing content (images and video especially) is preferred to content created by destinations.
- ▶ Visitors demand better value and continue to search for bargains.
- ▶ Ethical priorities continue to evolve and there is growing emphasis on cultural capital.
- ▶ There is concern about health and a desire to escape everyday pressures is driving more active leisure trips.

Finally we commissioned research into the business tourism sector to complement work on the leisure tourism sector.

### What the business tourism evidence told us:

- ▶ **There is no baseline data** on business event space occupancy.
- ▶ **The area does not currently feature on the UK destination awareness monitor** for international buyers.
- ▶ The Business Visits & Events Partnership class Leicester as a tertiary destination yet the size of its offer has the capability to be second tier.
- ▶ **The area has a strategically beneficial location** for the meeting and events sector with excellent road, rail and air links.
- ▶ **The area has 140 market-ready meeting and event spaces**, accommodation providers and incentive tourism options able to accommodate between 5 to 2,500 delegates and one of the largest hotels in the UK.
- ▶ **There are proposals to create an additional 850 bed spaces by 2021** in Leicester.

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### 5. WHERE DO WE WANT TO BE?

**We want to become a leading leisure and business tourism destination where visitors are compelled to come and uncover our story, increasing the value of tourism to the local economy to £2.1bn by 2025.**

Between 2018 and 2025, we aim to increase staying visitors by 839,000 (22.3%), day visitors by 2.1m (6.7%) and the economic impact of tourism by £222m (11.8%).

These increases equate to an average annual increase of 2.9% for staying visitors, 0.9% for day visitors and 1.6% for economic impact. These are realistic yet ambitious targets that depend on delivery of this Plan – especially around increasing the number of staying visitors. Over the course of this five-year plan, we will build and refine targets to reflect direct investment, over and above projected targets linked to STEAM trend analysis.

The key performance indicators (KPIs) are shown in the table here. They will help to keep us on track and be reported through partnership mechanisms including the Tourism Advisory Board and local authorities.

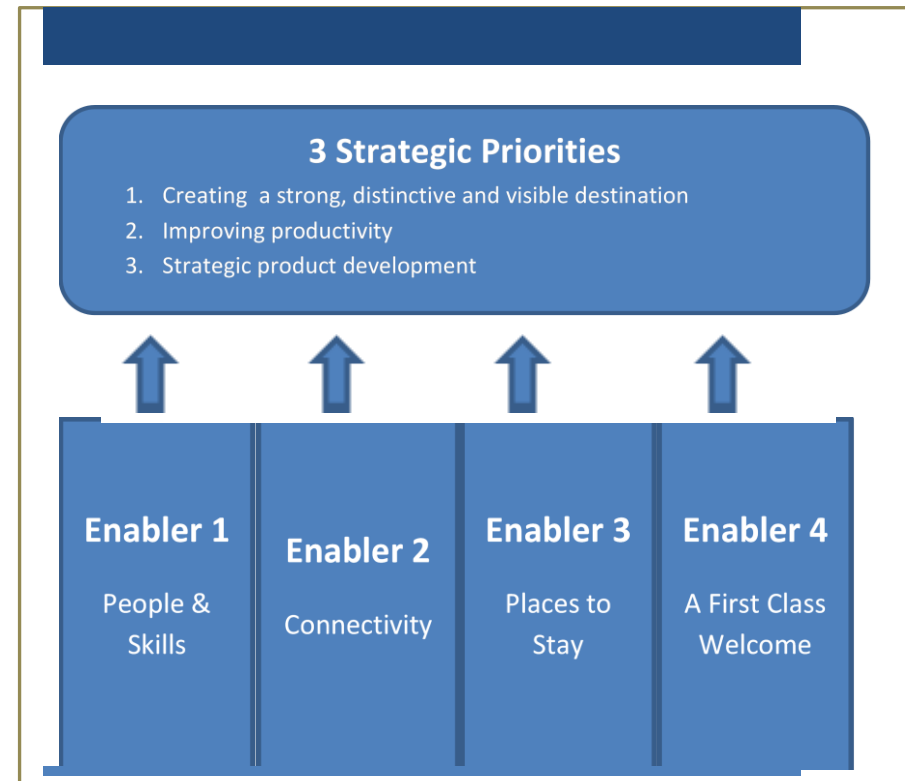
KPI	Why it's important	Measured by.....
Staying visitors and accommodation occupancy	To determine success in attracting staying visitors and improvements in seasonal spread	STR hotel trend analysis reports
Economic Impact	To monitor tourism sector performance by measuring day and staying visitor numbers and spend	Annual STEAM tourism economic impact reports
Number and value of Meetings Incentive, Conference and Events (MICE) activity that involve overnight stay	To monitor the success of business tourism activity in promoting overnight stays and economic impact	Business tourism service local KPIs

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### 6. HOW CAN WE GET THERE?

#### Creating a Tourism Growth Plan that the whole sector can get behind

There are a number of tourism and economic development plans for the component parts of the Leicester and Leicestershire destination. This is the opportunity to align them and give the sector a unified focus. A plan for the sector is a shared statement of intent and will set down key priorities, activities and projects that funders and stakeholders feel offer the best prospects to increase the competitiveness of the destination and maximise the wealth that the tourism sector can create. It will help stakeholders to visualise the actions they will take to play their part in achieving our collective ambitions for the area over the next 5 years.



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### TOURISM GROWTH PLAN - STRATEGIC PRIORITIES

#### Strategic Priority 1: Creating a strong, distinctive and visible destination.

Tourism is fiercely competitive and destinations operate in a global environment, all working hard to be noticed. Visitors can go anywhere and are particular about the destinations they choose: they know what they want, can easily check what's available and how others rate it.

From research, we know there is low awareness and knowledge of our tourism offer, particularly among those who haven't visited. Seen from the outside, there is no consistent narrative about the area to suggest a strong sense of place, and in many cases tourism businesses don't even say they are located in Leicester and Leicestershire in their marketing communications. The tourism sector is fragmented and tends to prioritise local or individual concerns rather than collaborating on a shared ambition.

To get recognition as a tourism destination of choice, we need to clearly establish our identity in the marketplace, differentiate ourselves for external audiences and be clear about what we offer. We need to start controlling the destination messaging that is out there to avoid a plethora of mixed communications filling the vacuum. Then we must get our stakeholders to collectively get behind our campaign brand so everyone can benefit from a stronger and more visible national profile and enable the destination to grow its share of the visitor market.

**Uncover the Story** is the campaign brand that has been identified to address this challenge and provide an imaginative way to repackage our tourism offer. It has a strong 'nod' to the area's hero story of the King Richard III discovery and yet is sufficiently generic that all tourism businesses can align themselves with it. Many of our attractions, cultural experiences and heritage assets seek to tell some of the UK's most important stories, from the celebrity fossil Charnia to our part in the conquest of space, and these associations can make our tourism offer more intriguing and vibrant. They can make that authentic, emotive connection between visitor and place that has been eluding us and give a fragmented sector the cohesion it needs to achieve real growth.

**Uncover the Story** recognises the fact that Leicester and Leicestershire is a destination made up of a collection of different visitor products and experiences, all with a unique tale to tell. It enables us to tell our story through our partners rather than taking a 'top down' approach to selling the area, making our local businesses our destination ambassadors. A compendium of local stories will be used as hooks for external audiences (including consumers, travel trade and the media) and used to inspire itineraries, narrative for destination videos and websites.

In partnership, we will use **Uncover the Story**, to raise awareness of Leicester and Leicestershire as a compelling and distinctive destination.

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Action
An <b>Uncover the Story</b> toolkit and guidelines for use to establish the campaign identity along with an asset bank of images and video
Support key quality story development through which the campaign brand will be built
Establish destination profile based on <b>Uncover the Story</b> on key digital platforms (Trip Advisor, Visit Britain). Work with region's gateways (road, rail, air) around the messages they convey about area as a tourism destination
Support our museums and visitor centres to become our primary storytellers of place and gateways to appreciating Leicester and Leicestershire
Use the <b>Uncover the Story</b> campaign as a platform to better connect Leicester and Leicestershire's rich industrial heritage to the visitor economy. The area boasts some of the earliest developments of the Industrial Revolution in canal and rail transport as well as popular visitor attractions such as Abbey Pumping Station, Foxton Locks and Moira Furnace. Planned developments in Coalville and Snibston Park, including the 'Many Faces of Palitoy' project, will support the campaign

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### Strategic Priority 2: Improve Productivity

Leicester and Leicestershire already have great tourism assets, we just need to maximise their potential to the visitor economy. Our tourism assets have the potential to deliver more: more visitors, more spend, more profitable businesses, more jobs and more economic impact. We have capacity in many of our hotels, restaurants and attractions, particularly in low season, and need to find new ways to fill it. We don't necessarily need lots of new product to achieve our objectives; we can focus on making our existing assets more productive by improving them, investing in them or packaging them up to make them more appealing to more people.

We need to encourage the visitors who come to stay longer and spend more. We can use our marketing resources to target larger groups and premium visitors. We need to see a shift from 'day' to 'stay' as longer visits equate to greater visitor spend and as part of this approach need to ensure we have the accommodation infrastructure to support it. In areas where accommodation is at capacity, we will take a more pro-active approach to addressing supply, and support planned investment, so that this barrier to growth is removed.

There is a recognised strategic need to improve the beneficial local tourism impact from East Midlands Airport. Visitors travelling by air spend an average of £728 per person in the UK, if they stay outside London they stay longer and if they use a regional airport are more likely to stay in that region. East Midlands Airport has ambitious growth targets to double passenger numbers to 10m over the next 25 years, which has huge potential to maximise economic value from inbound tourism.

As part of our efforts to improve productivity, our ambition is to realise the full economic potential of the business tourism sector to help fill our hotels and meeting venues, address seasonality and better utilise our attractions for the corporate market. Our area, located in the centre of the country with great road, rail and air connectivity, is ideally suited for meetings, incentives, conferences and events (MICE). With over 140 unique, quality-assured and award-winning event venues available, we have considerable local potential. Our aim is to champion business tourism and ensure the sector remains a vitally important part of our local visitor economy. We need to work towards a step change in promoting the offer to increase the number of companies planning and booking meetings and conferences in the area.



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Action
Deliver our Business Tourism Strategy. Identify key industry opportunities to drive future business e.g. Space Park Leicester
Strengthen partnerships with East Midlands Airport, and other regional destinations, to achieve regional ambitions on inbound visitors and link this to a possible Tourism Zone development
Support Leicestershire & Rutland Sport's <i>Premier Sporting Location</i> campaign to bring major events into the sub-region
Develop mechanisms to capitalise on the large audiences attending major local spectator sport and cultural events to cross promote our tourism product e.g. Big Sporting Weekends Calendar
Create themed itineraries and trails for both independent and group travellers to extend visitor days and stays e.g. around Triumph and motorsports
Create bookable product to increase collaboration with the travel trade and support inbound tourism initiatives. Promote through online channels as a route to market (TXGB, Visit Britain Supplier Directory & E-Shop, Airbnb, Stay, Play & Explore)
Use key digital promotional platforms to showcase our destination and connect consumers with our tourism offer
Increase all weather facilities to make better seasonal use of existing product and increase venue capacity where demand exceeds supply
Reach new audiences by linking up to regional/ national initiatives with good fit to our local tourism offer (e.g. Discover England Fund, Coventry City of Culture, Birmingham Commonwealth Games, Midlands Engine China Strategy)
Make better use of our excellent retail offer for the visitor economy (Highcross, Fosse Park, The Engine Yard, Ferrers Centre, Wistow Rural Centre and independents from garden centres to vintage shops) through inclusion in visitor itineraries, campaigns and local destination information
Support SMEs and micro businesses to improve business performance through digital connectivity and knowledge and skills (e.g. how to access investment funding and working with the travel trade)
Encourage local residents to be our tourism ambassadors through campaigns like <b>#HomeTourist</b> to capitalise on the strength of the Visiting Friends and Relations (VFR) market
Conduct an audit of visitor information and ensure it is available where visitors are most likely to need it and in their preferred format

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### Strategic Priority 3: Strategic Product Development

- ▶ Activity 1: Backing our Winners
- ▶ Activity 2: Product Development Campaigns
- ▶ Activity 3: Developing Local Destinations

#### Activity 1: Backing our Winners

We intend to champion new product developments currently in the pipeline that will help us to achieve our growth targets. These high profile, ambitious regeneration and infrastructure projects have the potential to deliver great quality experiences, drive additional visitors, extend visitor stay, increase visitor spend and create new jobs. This new product will help add breadth and depth to the destination, widen its appeal to new audiences and sell our area more powerfully and distinctly in the market place. Among those new projects we have identified as our winners are:

- ▶ **National Space Centre – Vision 2025: More Space, Greater Impact** - a major expansion project which includes an Extended Reality Laboratory and Astronaut Training Centre
- ▶ **Twycross Zoo – TZ2030 Vision** - a £55m project to achieve over 1 million visitors through creation of a National Science & Conservation Centre and nationally-recognised children’s character zone (opening in 2021)
- ▶ **Roman Leicester at Jewry Wall** – a world-class visitor attraction showcasing Leicester’s Roman heritage
- ▶ **Heart of the Forest Vision** - including the **Conkers Aerial Walkway** - a project to create the UK’s longest aerial walkway
- ▶ **Great Central Railway – Growth Plan**. This includes ‘Bridging the Gap’, a project to create a continuous 18 mile heritage railway line and new visitor attraction at North Terminus
- ▶ **Bosworth 1485 Sculpture Trail** – Creation of a sculpture trail of six art works in Market Bosworth and the surrounding area related to the King Richard III story and Wars of the Roses
- ▶ **Everards Meadows and Fosse Park development**. The Everards Meadows development includes a new beer hall, brewery tours, cycle centre and café. The £150m expansion of Fosse Park and redeveloped food court ‘Food Central’ will, on completion, make the retail park the largest of its kind in the country.
- ▶ **Melton Rural Food Enterprise and Innovation Zone** – a plan to improve connectivity, create centres of excellence for food enterprise and innovation and harness the experiential attributes of food to animate the high street and underpin the Rural Capital of Food brand.
- ▶ **Leicester Cathedral Revealed** – a project to add further value to the King Richard III discovery story through a Cathedral restoration programme and Heritage Learning Centre.

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### Activity 2: Product development campaigns

We will develop campaigns that encapsulate a facet of Leicester and Leicestershire that will help to make it distinctive as a visitor destination and unify both urban and rural areas. Product development campaign themes include:

- ▶ **The King Richard III Discovery Story** – *creating a critical mass of activities and experiences themed around the remarkable King Richard III discovery and the King’s connection with Leicester and Leicestershire.*

Action
Closer partnership working with key attractions: King Richard III Visitor Centre, Bosworth Battlefield and Visitor Centre, Bosworth 1485 Sculpture Trail, Battlefield Line Railway and King Richard III walking trails
Mapping places in the area with links to the Wars of the Roses
Creating and promoting themed itineraries and bookable product

- ▶ **Taste the Place** – *a campaign to highlight the area’s food and drink reputation by showcasing sub-regional food and drink both to eat, drink, buy, see in production and experience through activities and events.*

Action
Support Melton’s ambitions to develop its reputation as Rural Capital of Food through the Melton Place Plan
Support festivals and events like the East Midlands Food Festival, British Pie Awards, Artisan Cheese Fair, Chocfest, Edible Forest, Canteen, farmers markets and Harborough Taste Trail to animate the area and raise awareness of local producers
Encourage visitors to experience the food and drink they consume through a range of curated experiences including brewery and distillery behind-the-scenes tours, gin schools, food demonstrations, tasting sessions, workshops and classes
Encourage the tourism industry to ‘keep it local’ by sourcing local produce to add value, and enhance the visitor experience, through authentic local flavours
Create and promote themed itineraries and bookable product

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- ▶ **Fit-cation** – *inspiring gentle adventuring and personal challenges through physical activity as part of short break activity holidays and trips*

Action
Map our country sports, waterways, golfing, cycling, walking, riding and outdoor pursuits activities and identify those with bookable product, or established routes and trails, and link them more obviously to the visitor economy infrastructure
Capitalise on the fact that Leicestershire is surrounded by 70 miles of water, and divided by the River Soar, to develop a range of leisure activities on or near rivers and canals in partnership with West Midlands Growth Company, Canal & River Trust and individual tourism businesses
Promote the National Forest as a sustainable and active short break destination including high quality offers such as E-bike Holidays
Closer partnership working with established providers to create more bookable product and itineraries to support the campaign e.g. National Forest, Rutland Cycling, Stoney Cove Dive Centre, Leicester Outdoor Pursuits Centre, Let's Get Lost Leicester.
Work in partnership to develop more visitor friendly walking and cycling routes and trails that offer something special and share our unique stories.
In partnership with Leicestershire & Rutland Sport, strengthen connections between sport and leisure businesses and local accommodation providers to stimulate short breaks

- ▶ **Creative Edge** – *promoting discovery and creativity, using cutting edge technology to enhance the experience of visitors.*

Action
Encourage those attractions, cultural experiences and heritage assets that tell some of the UK's most important stories to keep investing in technology to enhance the visitor experience, improve interpretation and engage visitors creatively with their messages
Support our major growth projects, like Roman Leicester at Jewry Wall and National Space Centre Vision 2025, in their work to develop experiences using augmented and virtual reality and 4D.
Embrace opportunities to promote Leicester as the centre of UK E-Sports, supporting the sector's needs and identifying how it can support our tourist aims
Map existing apps and online content that help visitors to better understand and enjoy our tourism assets and destinations then increase their visibility and facilitate their wider promotion

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### ➤ Activity 3: Developing Local Destinations

We will support the development and promotion of individual visitor destinations in the area and help them amplify and define their distinctive offer. We will work in partnership with district councils, tourism organisations and partnerships and in line with agreed local tourism development plans.

- ▶ **Leicester** – The city is one of the oldest in England and celebrates its 2,000 years of heritage through museums, visitor centres and on-street interpretation. This is being further developed through the Old Town project that will rebrand and interpret the historic core of the city. Leicester also provides the focus for the King Richard III discovery story through the Visitor Centre and Cathedral. The City provides the urban core of the destination and can act as a gateway to the wider area as well as a mini break destination in its own right. It has the largest accommodation offer, a cosmopolitan food and drink offer, complementary retail offer and strong cultural, sporting and entertainment offer.
  
- ▶ **The National Forest and the Forest Town of Ashby de la Zouch** – The National Forest has been developing as an exemplar sustainable tourism destination for the past 25 years and we want to support its ambitions to further develop the Forest experience in line with the priorities identified in its Tourism Growth Plan. The collective National Forest as a destination provides a critical mass of activities that are distinctive to the Forest and create a strong joined-up offer including walking and cycling trails, the Hicks Lodge Cycle Centre, Bradgate Park, Conkers family visitor attraction, events and festivals such as Timber. The area also has a rich industrial heritage linked to the former Leicestershire Coalfield with attractions including the Moira Furnace, Ashby Canal, Swannington Incline and Hough Mill. The attractive market town of Ashby de la Zouch is also developing its reputation as a ‘Forest Town’ and has a good independent retail, food and drink offer with Ashby Castle (managed by English Heritage) a well-known landmark.
  
- ▶ **The Market Towns and District Visitor Hubs**

Tourism is important to the economy of our market towns and in partnership we can help amplify the tourism offer that is being developed.

  - **Visit Harborough** – The area combines an attractive waterways offer, unique cultural offer (Nevill Holt Opera and Kilworth House Theatre), luxury hotels and fine dining experiences in addition to a strong outdoor pursuits and activities offer (e.g. Armoureddon, Avalanche Adventure, Axceler-8, Wistow Maze). Market Harborough is a charming 13<sup>th</sup> century market town with a quality independent retail and food and drink offer (successfully promoted through Harbs Collective and Taste Harborough). The market town of Lutterworth is full of stories waiting to be uncovered including that of Sir Frank Whittle, inventor of the jet engine. The Grand Union Canal runs through the area and features the longest and steepest staircase locks in the UK at Foxton Locks.

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- **Melton Mowbray** – This is one of the oldest market towns in the UK. It promotes itself as the Rural Capital of Food reflecting the area’s association with Melton Mowbray pork pies, Stilton cheese, agriculture and food manufacturing. The town supports a successful calendar of themed food related festivals including the National Pie Awards, Artisan Cheese Fair, Choc Fest and internationally renowned East Midlands Food Festival. Through the Melton Story vision, articulated in the Melton Place Plan, the town is further developing its recreational food and drink experiences and using its unique stories to inspire imaginative public realm interpretation, cultural festivals and events. It also plans to capitalise on its Purple Flag status to grow its night economy and overnight stays.
- **Explore Bosworth** – This area is rich in history as Bosworth Field was the site of the decisive battle of the War of the Roses between Richard III and Henry Tudor. The proposed Bosworth 1485 Sculpture Trail will connect all the places nearby that are associated with this key event and, along with the Bosworth Battlefield Visitor Centre, create a critical mass of visitor attractions to support the King Richard III story. Key attractions in the area include Twycross Zoo (renowned as a World Primate Centre, the destination’s largest attraction and third largest paid-for attraction in the East Midlands) Bosworth Water Park, the Battlefield Line Railway, Bosworth Marina and the Ashby Canal. Market Bosworth has an attractive market square and streets filled with old pubs and coaching inns, thatched cottages and Georgian houses.
- **The Charnwood Forest and Loughborough** – The Charnwood Forest area offers both outdoor recreational activity and visitor attractions. For those that enjoy the great outdoors there is historic Bradgate Park, Beacon Hill Country Park, Bardon Hill, The Outwoods, Swithland Woods and Pillings Lock. Other attractions include the National Trust’s Stoneywell Cottage, 1620s House and Garden, the UK’s first Trappist brewery at Mount Saint Bernard Abbey and historic Charnwood villages. Loughborough, on the edge of the Forest area, has an award-winning market. This famous university town has fascinating stories to uncover in The John Taylor Bell Foundry & Museum (the world’s largest working bell foundry), the WWI Carillon, the Great Central Railway (the UK’s only double track mainline steam heritage railway complete with restored stations) and the home of Ladybird Books at Charnwood Museum.
- **Everards Meadows & Fosse Park Visitor Hub** - Everards Meadows is a development that incorporates the new Everards brewery site and Rutland Cycling, opening up 80 acres of green space with connection to the National Sustrans. It links with Fosse Park (one of the busiest out-of-town retail centres in the country with 11m shoppers and £150m expansion plans), and nearby Marriott and Hilton Hotels, to create a new visitor hub in the district of Blaby. Everards Brewery will celebrate over 170 years of local brewing heritage with a beer hall, brewery tours and a retail outlet at the site whilst Rutland Cycling provides retail and bike hire opportunities for visitors to enable them to explore Leicester and the surrounding area by bike.

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### ENABLERS

There are underpinning opportunities that we need to develop to support growth in the visitor economy.

#### ENABLER 1: PEOPLE & SKILLS

We need to further develop our workforce with the skills and enthusiasm to deliver outstanding service to visitors. The seasonal nature of tourism, and anti-social hours of work, often leads to a perceived low status for many jobs and poor perception of tourism and hospitality as a career choice. We have education providers to help those entering the industry to develop the skills we require but we need to support them by finding creative ways to inspire young people to see tourism as an exciting and rewarding industry with good career pathways providing opportunities to progress. We need the support of the sector to play its part in getting that message across to young people in full time education, as well as their families and careers advisors who influence their career choices, through quality encounters between young people and businesses and clearer employer engagement plans. Once in the education system, we need to support efforts to improve the work readiness of young people as part of a multi-partner approach.

We also need to explore the opportunities provided by an older workforce to address labour shortages. As jobs are lost to automation, individuals at all stages of their careers may find new opportunities in tourism and hospitality, a sector that relies on nonautomated skills and offers flexible working arrangements.

Action
Create a sub-regional centre of excellence to prepare people to enter the industry, championing and promoting the good provision of local stakeholders utilising partnerships with the LLEP, Leicester Employment Hub, East Midlands Chamber of Commerce, local authorities, further education colleges, local universities, schools, professional bodies and Leicestershire & Rutland Sport
Support programmes of industry placements and school/industry partnerships (outreach programmes, careers talks, careers fairs) in collaboration with the Enterprise Advisor Network and Careers Hub
Share industry success stories to personalise careers and bring the sector to life
SME support for apprenticeship programmes for all and support for National Apprenticeship Week
Learning from best practice e.g. Institute of Hospitality and Careers Colleges, My Hospitality World
Supporting the roll out of new T Levels in tourism and hospitality as part of a reformed skills training system

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### ENABLER 2: CONNECTIVITY

#### Connectivity - Communication

We need to maintain effective strategic and operational partnerships to aid the success of the local visitor economy. Nationally, we need to continue to strengthen our relationship with Visit England/Visit Britain and regionally with East Midlands Airport, The Midlands Engine Tourism Partnership and other Destination Management Organisations.

At a local level we need to encourage tourism businesses and other stakeholders to play their part in delivering the Tourism Growth Plan. To do this, stakeholders need to feel engaged and informed. The most effective way to do this is through the Tourism Advisory Board and local tourism partnerships and forums. These platforms play an important role in sharing communications with stakeholders, encouraging joint working and achievement of local sector plans, raising awareness of best practice and disseminating training and business development opportunities. We also need to continue to develop the Tourism Advisory Board (TAB) as a network of champions and ambassadors for growth and change in tourism, providing strong local leadership and commitment to overseeing the successful delivery of the Tourism Growth Plan ambitions.

Action
Support for local tourism plans and regular engagement with tourism partnerships and forums
E-newsletters to businesses
Local workshops to support delivery of Tourism Growth Plan priorities
Ensure TAB membership and meeting programmes support delivery of Tourism Growth Plan priorities
Active engagement with regional and national tourism organisations to maintain the area's profile as a tourism destination and capitalise on funding, marketing and development opportunities.
Explore opportunities for joint campaigns with other Midland DMOs e.g. Shakespeare's England,

#### Connectivity – Getting Around

The Local Industrial Strategy for Leicester and Leicestershire prioritises clean growth to achieve a healthy place to live and do business in. Given the fact that almost every tourism service and product utilises energy, we need be mindful of the associated carbon impact of sector growth from increased visitor numbers. One way in which we can support the low-carbon agenda is to encourage local attractions to develop green travel plans. In addition to the environmental impact of cars, private vehicles cause congestion on local roads and parking issues for local residents and attractions



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alike. If we are to develop international visitors, improving the legibility of transport options and routes will help support our growth ambitions (48% of overseas visitors surveyed by Visit Britain in 2013 were nervous about driving in the UK and saw this as a barrier to travel beyond London). Rural areas face particular challenges with connectivity with some attractions only accessible by car.

Delivering the Fit-cation campaign will rely on good walking and cycling networks that are safe and family friendly and we need to support efforts to develop this infrastructure. This will encourage the larger number of visitors who may not venture off the beaten track to consider a walking or cycling 'try-me' experience for a few hours in the countryside or urban areas.

Action
Support businesses wanting to improve visitor access by public transport, or from footpaths and cycle ways, to connect with relevant public sector departments or transport providers
Encourage businesses to promote green travel plans on websites and provide links to <a href="http://www.choosehowyoumove.co.uk">www.choosehowyoumove.co.uk</a>
New and improved sustainable travel routes between attractions and urban areas e.g. between Moira Furnace and Hicks Lodge and Hicks Lodge to Ashby

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### ENABLER 3: PLACES TO STAY

Whilst overnight trips account for only 11% of visitor numbers, they account for 39% of economic impact.<sup>1</sup> Increasing the supply of accommodation therefore will have a significant effect on tourism spend. Two of the ambitions of the Tourism Growth Plan are to convert more day visitors into staying visitors and achieve an upshift in average length of stay for business events. To achieve these ambitions we need to be sure we have the accommodation supply in the areas where we need it. We are developing a good base of evidence on accommodation development opportunities in East Leicestershire, Hinckley & Bosworth and North West Leicestershire (who are preparing a Visitor Accommodation Development Acceleration Plan). The National Forest Company are also formulating a Visitor Accommodation Development Strategy and Action Plan. Leicester is currently experiencing an increase in accommodation supply with two developments of 252 rooms currently under construction and potentially a further 900 rooms from new hotels or extension projects in the pipeline. This positions the city to act as a gateway to the wider area having the largest accommodation offer in the sub-region.

Action
Work with the Invest in Leicester Inward Investment team to identify land and property owners and developers that are interested in accommodation development
Raise awareness of the accommodation development opportunities across the county through publications and property events
Build on the success of the LEADER programme by encouraging future funding streams to support diversification initiatives linked to accommodation development
Map and promote seasonally available accommodation released by the academic sector
Marketing training and advice for small accommodation business owners

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### ENABLER 4: A FIRST CLASS WELCOME

Consumer expectations in relation to visitor welcome and service quality have never been higher. Visitors expect and demand quality in all aspects of their experience and if they don't perceive that they get it, will take to social media and customer review websites to share their views. In order to remain competitive the quality of our tourism offer must continue to develop and strive towards the attainment of excellence.

We can support businesses by raising awareness of quality assurance schemes that benchmark against industry standards. We also need to ensure that post arrival, visitor needs are being taken into account regarding provision of services including wayfinding and signage to aid orientation, visitor-friendly car parking arrangements and maintaining the public realm to a high standard. If visitors have the best possible experience, they are more likely to return. Research shows that there is a direct correlation between the quality of a visit and level of spend but just one weak link in the chain can undermine the whole visitor experience. Both public and private sectors need to work in partnership to get the overall experience right as the services and facilities visitors use during a visit are supplied by a number of providers.

Action
Support businesses to understand and appreciate the impact of digital marketing and social media
Promote awareness of the range of quality assurance schemes for accommodation, attractions and restaurants and encourage businesses to become accredited (Visit England and local tourism Awards for Excellence, Trip Advisor certificates of excellence, AA National Quality Assessment Scheme for accommodation, Visitor Attraction Quality Scheme, Green Tourism Scheme, Welcome Host etc.)
Plan how to improve signage and information at key gateways including East Midlands Airport, railway stations and main car parks

In Leicester & Leicestershire, we want to make all our visitors feel welcome and ensuring we are an accessible destination is part of that. We need to ensure we meet the needs of our older visitors and those with disabilities by encouraging our businesses to understand and support their requirements. This will help us to remain competitive, maximise market opportunities and improve the quality of every visitor's experience.

Action
Encourage businesses to share their accessibility information on their websites and marketing collateral
Complete a destination access audit
Run workshops and share information, tips and advice on how to help tourism businesses become more accessible

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