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A strategic tourism outcomes proposition for Cheltenham

Final Report, 8 February 2015

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Images:

Cheltenham Festivals at the Town Hall, Bourton-on-the-Water, Glos.

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Contents

OBJECTIVE OF PLAN

To create a new route map for Cheltenham's tourism development, building an action-orientated plan that encourages the full breadth of the tourism sector to engage and collaborate to generate momentum, investment and positive, sustainable outcomes across:

- strategic and tactical delivery structures and mechanisms;
- product and infrastructure development;
- research and marketing and communications.

Through the creation of an aligned outcomes proposition for Cheltenham's tourism offer, this document identifies means to:

- grow the town's tourism resilience and economy;
- clarify routes of delivery;
- measure success and impact on public value with defined resource requirements and timelines.

This document takes forward, and in some areas supersedes the 2011 Tourism and Marketing Strategy.

The progression from audit analysis to audit findings and proposed outcomes is demonstrated in order, which in turn informs the action plan. However, with extensive supporting material in the Addendum the document is also intended as a reference resource.

This document contains colour-coded content, so please consider when reproducing.

Executive summary

This outcomes proposition sets out an ambitious but achievable set of progressive steps for tourism in Cheltenham for the period 2016-2020. It is, by definition, a strategic report that provides a long-term vision and focus for collaboration and partnership working that will help to strengthen the competitive position for Cheltenham and its partners within and without the town, improving the performance of the tourism sector locally and regionally.

This outcomes proposition, based on extensive research and consultation, is a call for active support from positive tourism stakeholders and partners locally and regionally. It places this in the context of wider agendas of economic development and infrastructure, cross-cutting public and commercial interests, reflecting the realities of the visitor economy itself. As such, there are a number of immediate areas of development highlighted in the Action Plan that will help accelerate progress in achieving the shared outcomes detailed in this document. This in turn provides a platform for further engagement with stakeholders and partners – current and potential – to position Cheltenham as a vibrant and confident tourism destination in a competitive visitor economy.

The town does attract tourist visitors already of course, but a more coordinated and committed plan will achieve so much more. There are reasons to be confident. The key tourism stakeholders are already coming together through a tourism partnership, and The Cheltenham Trust is establishing its new role for culture, leisure and tourism. Cheltenham has a number of genuinely strong assets, from its standout major cultural events to its independent retail and hospitality offer, and of course it is nestled up against the Cotswolds. Culture[1] lies at the heart of Cheltenham's authentic and distinctive appeal.

There are opportunities to grow the visitor economy through a collaborative development of tourism infrastructure and systems – information & research, planning & development, marketing & communications – creating new reasons to visit and return. With a shared vision (which has emerged through an audit process) and clear leadership delivered through a model that works for the town as a whole, Cheltenham's tourism planning and delivery can contribute to the wider economic development and sense of place, its positioning and image. This can build on the existing status of Cheltenham's as a very highly ranked place to live, work, and raise and educate a family. Adding 'to visit' to this list is a natural extension, albeit one that should work closely to ensure that the benefit to visitors is mirrored for residents.

[1] 'Culture' refers to the combination of arts, heritage, sports and related leisure events, venues and activities.

Context – an introduction

This section sets the scene for the strategic tourism outcomes proposition, presenting a brief overview of tourism activity to date and the strategic insight and timeliness that has led to this document being commissioned. It also presents some of the core data upon which the other findings have been tested and the subsequent strategic direction has been developed.

WHY DOES CHELTENHAM NEED A TOURISM STRATEGY?

Tourism as a sector never stands alone; it is a cross-cutting theme running through other strategies, such as economic development, health and wellbeing, culture (which incorporates arts, sports and heritage assets and related programme, events and activities), transport, public realm, community engagement to name a few. Creating opportunities and benefits for visitors also provides opportunities and benefits for local people. It is local people who sustain cultural attractions, the food & drink offer and retail year round through their patronage. Cheltenham is bidding to achieve Business Improvement District status, which, if successful, will bring additional resources into the town, focusing on: marketing and promotion, parking incentives, town centre events, public realm improvements and signage.

Competitors, such as neighbouring destinations Bristol and Bath are working collaboratively to target cultural tourists. Gloucester has set up its own destination marketing organisation (DMO)[2] to support the repositioning of the town as a historic, cultural and sporting tourism destination. Many post-industrial cities, especially in the north have reinvented themselves as tourist destinations, often with culture at their heart. Tourists, especially culturally-focused tourists, are more marketing savvy than ever before. They do not rely on official channels, for example official destination websites, as their only source of information, they are much more digitally literate, using multiple channels to help them to make their destination choices, before, during and even after their visit as they plan their next break. Nor do tourists recognise local authority boundaries or even county boundaries.

In focusing on Cheltenham, it is impossible to ignore neighbouring destinations such as the Forest of Dean, Gloucester and of course, the internationally known Cotswolds. There is a willingness from all these

[2] DMO – can be either a Destination Management Organisation or Destination Marketing Organisation (see Addendum H)

destinations to work together collaboratively, as evident from the consultation process, even if there has not yet been a solid track record of partnership working. Resources are limited locally, regionally and nationally, and no matter what additional resources may be leveraged to support the delivery of this strategy, working in partnership with neighbouring destinations will be vital to maximise opportunities.

CHELTENHAM TOURISM – A BRIEF HISTORY

Cheltenham grew as a spa town in the 18th century, inviting visitors to 'take the waters'. The restorative and relaxing nature of this 'inland resort' remains a part of its identity to this day. Visitors still come to the town in numbers of course, albeit not necessarily for the waters.

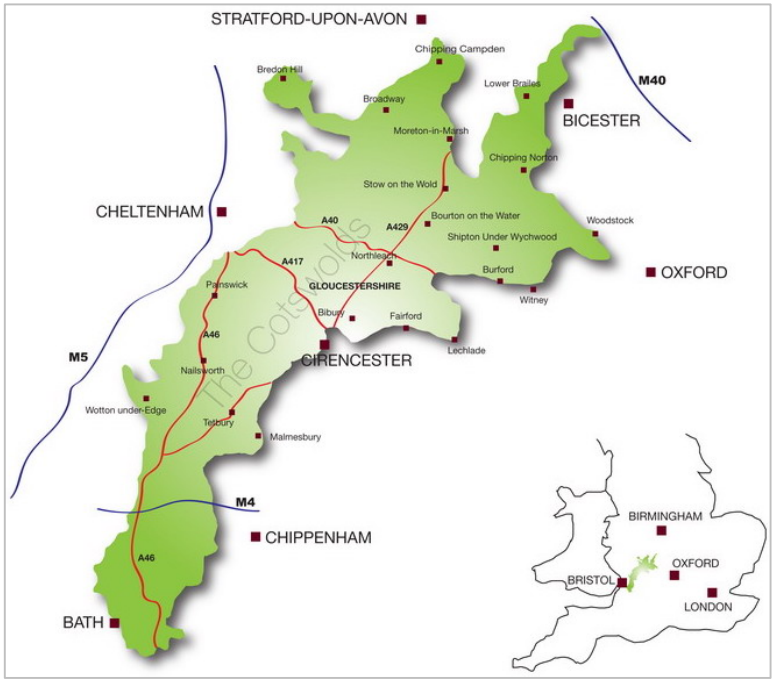
Alongside many towns and cities, the last few decades have seen a real term decrease in investment in tourism campaign and development activity. Cheltenham's assets are relatively strong, with some national and internationally known events in particular. The town is the highest rated place to live, work and raise a family – a notable and relevant achievement.[3] The historic DNA of an 'inland resort' can also be seen in the attractiveness to retired communities, and whilst the average age of the town may be higher in perception than reality, this could have an impact on how the town is viewed as a place to visit. Eastbourne's average age is over 70 – Cheltenham's average age is a much more balanced 40.[4]

The Cheltenham Gold Cup delivers significant name recognition for the town, and the economic impact of the Racecourse's National Hunt programme is a major regional asset. Cheltenham's cultural credentials also have an international status that provides further opportunities to grow visitor markets. Cheltenham Festivals have developed and present four major events – Music, Jazz, Literature and Science festivals. Speaking of just one, Professor Brian Cox summed up the scale, ambition and positioning well, "*Cheltenham is, without doubt, the premier science festival in the country because it is supported by pretty much everyone who cares about promoting science in Britain*."

More recent developments have focused on economic development, but the shoots of strategic tourism development are in evidence through commissioning activity from Cheltenham Borough Council.

The context of the Cotswolds has become increasingly relevant, and whilst it is not essential to the image and perception of Cheltenham, its proximity – some maps put it adjacent and some even include the town in the area – it is important.

[3] The Telegraph, Britain's Top 20 Place to Raise a Family
[4] Cheltenham Census Data & Office National Statistics 2015



The image of this Area of Outstanding Natural Beauty (AONB) is one of picturesque honey-coloured limestone villages offering staging posts to walkers, cyclists and those generally seeking to 'get away from it all'. In the past 2-3 years a number of encouraging initiatives have emerged which could address this growing opportunity – commissioning The Cheltenham Trust to take on basic tourism activities and information services, the new Cotswolds Destination Management Organisation and a bid for a Cheltenham Business Improvement District. The opportunity for Cheltenham is how they can converge around a shared agenda to achieve the visitor economy outcomes that the town should be targeting – for the town and in the wider sub-regional context to deliver increased visitors, spend and profile, whilst still engaging with local communities.

In 2014, the Cheltenham Tourism Partnership Group was established – a grouping of key stakeholders from across Cheltenham's business, attractions, events, education and hospitality sectors. The Tourism Partnership Group was constituted to: 'Help develop the vision and provide a vehicle with which to engage with key stakeholders in developing the local approach to tourism promotion and to help maximise its contribution to the future wellbeing, vibrancy and economic success of Cheltenham'.

WHERE IS CHELTENHAM NOW?

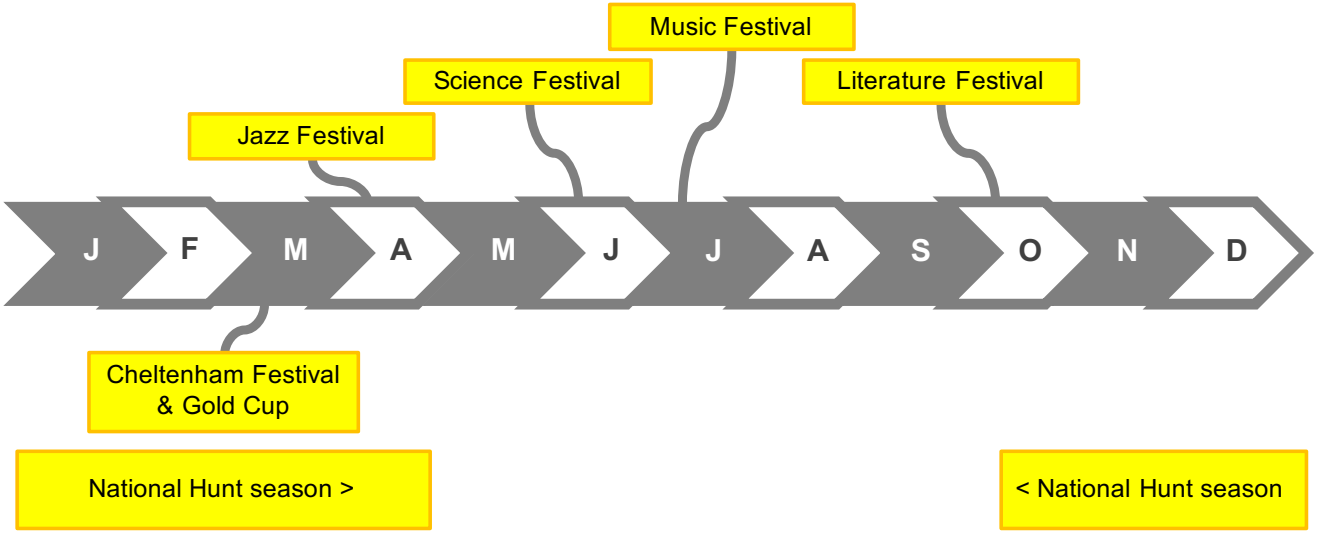
The top line offer

With a backdrop of Regency architecture and generous, leafy open spaces, visitors enjoy a number of key elements:

- A dynamic variety of festivals and major events – The Cheltenham Gold Cup and National Hunt horseracing season; cultural festivals, notably Literature, Science, Music, Jazz, and an increasingly high-profile contemporary art programme at The Wilson Art Gallery & Museum.
- Quality and independent shopping.
- A strong hospitality offer, best exemplified in the night-time economy and 'boutique' independent accommodation.
- Its location as a gateway to the Cotswolds, which remains the leading tourism brand in the sub-region.

The main dynamic, regularly changing parts of the offer are the festivals and events. Any destination will be summarised and then known for a handful of things – to do, to see. If that perception is not positive, accurate or is out-of-date, then it needs to be addressed.

This chart illustrates the calendar in terms of signature events.



Whilst Cheltenham has flagship cultural events, the five signature events account for only seven weeks per year. Events and festivals contribute towards place-making for locals and visitors. Having a strong year round cultural offer helps to create more reasons to visit (again) and to extend stays. There are other festivals, such as the Design and Poetry festivals but they have a low profile in comparison. Creating a more balanced calendar of events to support existing provision at the Everyman, Town Hall and other venues, across the year can provide additional hooks for tourism promotion, particularly outside the traditional tourism season (April-September). Edinburgh is one of the best examples of a city that has broadened its festival focus from an over concentration on the traditional tourism season to a year round calendar. It is useful to note that York is now positioning itself as a city of festivals and is leading with its cultural offer, rather than its heritage offer through its current 2016 tourism campaigns.[5]

The marketplace is increasingly competitive, not least as UK towns, cities and regions are now alive to the possibilities of culture as a driver for place-making and tourism through the impacts of the European Capital of Culture and UK City of Culture programmes and market-leading examples of capital and collaborative investment in destination, from Margate to Manchester.

An emerging strategic consensus

There is a strong appetite amongst the partners to consolidate common positions around:

- A clear statement of vision and ambition;
- The principles that will need to underpin both the vision of future success and necessary progress amongst the partners;
- The partnership principles and governance that will need to underpin the collaborative working required to successfully deliver effective destination tourism – nettles need to be grasped and there is a clear will to do so, both to increase impact and mitigate risk;
- The importance of developing recommendations and forward options, which can capitalise on different scenarios in terms of future funds and asset base use.

[5] See York Case Study in Addendum A

Vision statements

This is a short 'context' piece of writing to convey a sense of what lies behind the proposition this document develops, namely a tourism destination of value, distinctiveness and potential. This is very much in the style of promotional copywriting, early thoughts towards a tourism narrative – just one way to articulate the culture-led tourism positioning for Cheltenham.

REVEALING THE OFFER

Uncovering what lies behind the Regency façade.

A place where culture and creativity infuse the everyday experience for residents and visitors alike.

A place steeped in history with a slightly subversive underbelly of secrets, hidden identities, new ideas and technical innovation.

A place where artists, writers, musicians, scientists, performers and thinkers want to explore, learn, entertain and share their knowledge and expertise.

Recapturing the spirit of its spa town heyday as an inland resort for rest, relaxation and recuperation, but coupled with a contemporary lively feel during the many festivals, events, performances, exhibitions and race meets that make up the town's busy cultural calendar.

Nestled on the edge of the Cotswolds, Cheltenham is its cultural hub, the obvious complement to the natural outdoors offer of one of the country's most popular rural locations, and within striking distance of the Forest of Dean too.

Established in the height of the Regency period in the early 1800s, as a place to escape to, Cheltenham has a distinctively English feel of grand architecture, beautiful gardens, independent boutiques, coffee shops, restaurants, bars and hotels, and even a promenade.

Cheltenham provides an indoor and outdoor canvas for established and emerging artists to play, experiment, take chances and create. Tapping into the wealth of young talent on its doorstep in its world-renowned schools and colleges, and the university to invigorate the creative offer all year round and make it visible to residents plus developing further reasons to visit for tourists.

Ensuring that festivals and events are completely embedded throughout the town, not just taking place on the periphery, creating a festival buzz and seasonal highlights throughout the year, every year.

Revealing the hidden stories, people and places that moulded Cheltenham and continue to shape its identity, but uncovering and exploring these through creativity. No one visiting the town should leave without visiting the Wilson Art Gallery and Museum, or understanding its role within the Arts and Crafts Movement, or why it was and is still a popular place to escape to, or how as a centre for ideas Cheltenham's impact ripples across the world.

CHELTENHAM IN 2020

To deliver the outcomes proposed in this report by 2020 Cheltenham will have developed:

1. New structures – Embedding partners in a dynamic and forward-looking model, improving destination management and the supporting infrastructure for the visitor economy.
2. Newly integrated planning – Putting Cheltenham at the heart of the offer for the Cotswolds, Gloucestershire and in the context of economic development. Shaping the county as a pre-eminent tourism destination, leveraging the Cotswolds and Gloucester brands alongside Cheltenham in clever and complementary ways.
3. New insights – Developing a robust benchmarking and market research model.
4. New investments – Targeting and securing significant growth in the product offer.
5. New enterprises – Encouraging the development of tourism enterprises and associated economic growth.
6. New perspectives – Taking a more international view of developing markets, through targeted packages, communications and campaigns.
7. New offer – Developing a concierge model (see Addendum H) for Cheltenham, joining up and elevating further the visitor welcome and service offer.
8. New image – Developing a distinct, contemporary brand for Cheltenham (connected with the wider regional offer) that is understood and adopted by the town, partners and the marketplace.
9. New engagement – Better influencing and enabling an increased number of visits through relationship building over time.
10. New experiences – Developing distinct new tourism-friendly itineraries and products, and enhancing existing ones (from iconic events, to the public realm and hospitality offer), thus enriching higher quality experiences for visitors.

Devising – audit

This section addresses the consultation & analysis phase of the study, providing a summary of the areas of investigation, analysis model and findings, based on the constructive contributions of stakeholders alongside wider market and digital metrics analysis. It is also important to link with sections of the Addendum C (need for market insight) and A (case studies), which add to the case for development.

UNDERSTANDING THE MARKET

The key to the successful implementation of this outcomes proposition is informed decision-making: informed by a thorough understanding of the tourism market (viewed as visitors from over 30 minutes drivetime from Cheltenham), both existing and potential and where the destination is positioned within the marketplace.

There is no research and evaluation framework in existence across Cheltenham, Gloucester or the Cotswolds currently and therefore a lack of consistency and volume with regards to collecting and analysing data. (It should be noted that new regional tourism research data will be published and shared via Cotswolds DMO in February 2016.) It also means there is a partial ability to measure impact, public value, understand market profiles, benchmark against competitors or know what is and is not working. This also means that setting targets is currently inhibited without understanding the existing baseline, visitor trends and potential for the future, and likewise for measuring success.

Under investment in research and evaluation of the tourism market, over the last five years, both in Cheltenham and more widely within the Cotswolds[6] has had an impact. There is some quantitative data, but most dates back to 2010-11 and very little qualitative data is available. Therefore, existing local and regional data is out of date and can only provide approximations towards visitor profiles, trends and patterns of behaviour. Through the research audit (see Addendum C) and looking at available national datasets, this has provided some useful additional insight that informs this strategy. However, as a result of limited evidence there have had to be assumptions made in the past about tourism markets in particular, based on partial information and anecdotal evidence.

According to The Value of Tourism 2010 Report for Gloucestershire, Cheltenham attracted just under 2 million tourist visits representing 14% of

[6] No detailed information available from Gloucester.

the total visits to Gloucestershire. This breaks down to day visits of 82%, domestic staying visits at 15% and overseas visits of 3% (though small, this figure is larger than for the rest of the county, including the Cotswolds). Visitor spend accounted for £140m making up 17% of visitor spend for the county. The greater average spend per trip by overseas visitors can be attributed to the average number of nights they stay in Cheltenham at 8 nights per trip, in comparison to 3 nights for domestic staying visitors. In taking the visit comparisons as a whole, the average spend per day by overseas staying visitors is lower than that for domestic staying visitors at £34.58 per day, compared to £53.32. Some of this difference is likely to be cheaper room rates for longer-term stays and less spent on transport in the area, but these findings indicate that the domestic market is likely to offer greatest value.

17% of all overseas visitors to Cheltenham are from Ireland (probably for Cheltenham Race meets), followed by France, USA, Germany, Netherlands and Australia, according to the International Passenger Survey, 2010-2014.

It is worth noting that over 600k visitors to Cheltenham every year are to its cultural attractions (excluding the Racecourse), of which 27% are local residents, 41% are visitors living in Gloucestershire, 31% are from outside the county and approximately 2% are from overseas.[7] That accounts for approximately 200k cultural tourist visits (whereby culture – excluding sport - was a determining factor for their visit by those from outside the county) with an average visit expenditure of £73.85 equalling approximately £15m cultural visitor spend per year, accounting for 11% of total visitor expenditure. According to the South West Region Racecourse Profiling 2008-13, Carat report, the Racecourse sells 400k tickets every year, with 80% of its tickets sold to visitors from beyond a 30-minute drivetime. As these combined figures do not represent the complete cultural offer in the town, they are probably somewhat conservative. These statistics prove that tourists, and especially cultural tourists to Cheltenham, provide a significant impact within the local economy. With a more strategic and proactive approach to tourism, Cheltenham has the potential to grow as a destination and particularly with culture at its heart, helping to shape its identity, both for locals as well as visitors.

In the Cotswolds Perception and Awareness Research conducted in 2012 amongst a sample of UK residents, 34% had visited Cheltenham, on a par with those reported visiting Gloucester and Worcester, but less than those who had visited Warwick and Bath. Respondents seeking short breaks cited the following motivations as key determinants in choosing a destination to visit – eating out (70%), cultural attractions (60%), festivals (47%) and shopping (45%). These are all attributes that Cheltenham possesses but without a proactive and strategic approach to place-making and tourism, the town is likely to lose out on this valuable visitor market to competitors.

[7] Based on latest available footfall and ticket sales figures for Cheltenham Festivals, Cheltenham Town Hall, The Everyman Theatre, The Wilson Art Gallery and Museum, Holst Birthplace Museum.

It is a real positive that awareness levels for Cheltenham are high amongst potential UK visitors, though lowest amongst young adults aged between 16-34 years. However, there is a general lack of visual awareness of what the town actually looks like.

According to the Value of Tourism 2010 Report for Gloucestershire, the Cotswolds attracted 16m visitors worth £1bn to the local economy, but the wider Cotswolds Area of Outstanding Natural Beauty attracted 23m visits worth over £425m in visitor spend, according to the most recent Destination Management Plan. Visitor profiles for the Cotswolds are predominantly UK based, aged 55 years and over, ABC1 social grade status, visiting without children and living in the South West, West Midlands and the South East. Visits tend to be a mix of day trips from outside the Cotswolds, short breaks staying outside the Cotswolds, with a high proportion of repeat visits and travelling by car. These visitors do have high satisfaction levels, hence the high proportion of repeat visits. Whilst there is not the clear evidence available yet, it is likely that the current visitor profile for Cheltenham is similar to the Cotswolds. This is borne out by assessing the visitor profile of the Town Hall bookers, which has an over-representation of adults aged 46-55 in relation to the population breakdown of South West residents.

The importance of the Cotswolds brand and offer for Cheltenham cannot be overestimated. In 2010 VisitEngland cited the Cotswolds as one of England's most established and world-renowned tourism brands that can help to attract visitors and encourage them to travel and spend more widely in the country as a whole. The Cotswolds Tourism Partnership Marketing Plan 2015 refers to a partnership aim to achieve sustainable growth of the Cotswolds visitor economy by 5% per annum and to improve the ranking from 6 to 3 in the VisitEngland list of top performing destinations over the next decade. This partnership currently includes Cheltenham and the plan makes reference to positioning Cheltenham as the cultural centre for the Cotswolds, wider campaigns linked to exhibitions at The Wilson, and building the profile of the Tourist Information Centre based at the Wilson as a one-stop-shop for visitors to Cheltenham. It is vital that Cheltenham works in partnership with the Cotswold Destination Management Organisation (DMO), as well as neighbouring towns to maximise opportunities for joint working, both nationally and internationally, and to understand the potential crossover markets. This collaborative working can maximise limited resources, e.g. jointly commissioning research.

With the product offer in Cheltenham remaining fairly static in the last five years, apart from the reopening of the Wilson Art Gallery and Museum, the lack of embedded strategic partnerships with regional and national tourism partners, and the lack of proactive marketing and communications, it is unlikely that visitor numbers have increased significantly since 2010. In looking at the International Passenger Survey 2010-14, the Great Britain Tourism Survey 2009-14 and the Great Britain Day Visits Survey 2011-13, both by VisitEngland, it is possible to gain some insight into visitor trends. There has been greater volatility in the numbers visiting Cheltenham over

the last five years, albeit that the underlining trend is consistent with that seen more generally across Gloucestershire and the UK. The figures do highlight some elasticity in demand from the overseas visitor market, therefore identifying the potential to attract more overseas visitors with the right offer.

There has been a downward trend in domestic staying visitors to Cheltenham but a steady increase in the day visitor market. Of course visitor spend by staying visitors is greater than day visitors and therefore this is of concern given the value of the domestic staying market to the town. Although the sample figures for 2011 for Cheltenham are small, it does seem that Cheltenham has out-performed the national average in terms of growth in all day visits over the period. In particular, the growth of the 3-hour plus leisure visit market has out-performed that for all day visits to Cheltenham and that for the day visit market overall. This highlights the potential to build on the day visitor market.

Cheltenham's bid for Business Improvement District status (not yet approved at time of writing) identifies a need for 'market research to identify how current users of the town (local people and visitors) think it could be improved and to identify potential new visitor sources.'[8] Cotswolds Destination Management Organisation has also identified a major gap in knowledge of current and potential visitors.

This highlights the potential for a joined up strategic approach to creating a research and evaluation framework that benefits all partners, avoids duplication and informs future tourism development based on viable target markets (see Addendum C).

[8] Cheltenham BID Information Sheet 2&3, 'Marketing and Promotion', p.4.

DESTINATION WHEEL – A MODEL FOR ANALYSIS

This study required more than market analysis to deliver useful development options – it required a holistic and strategic view of everything that could impact and contribute to effective and sustainable tourism activity. To bring coherence to the analysis, CTC's distinctive 360° approach was applied.

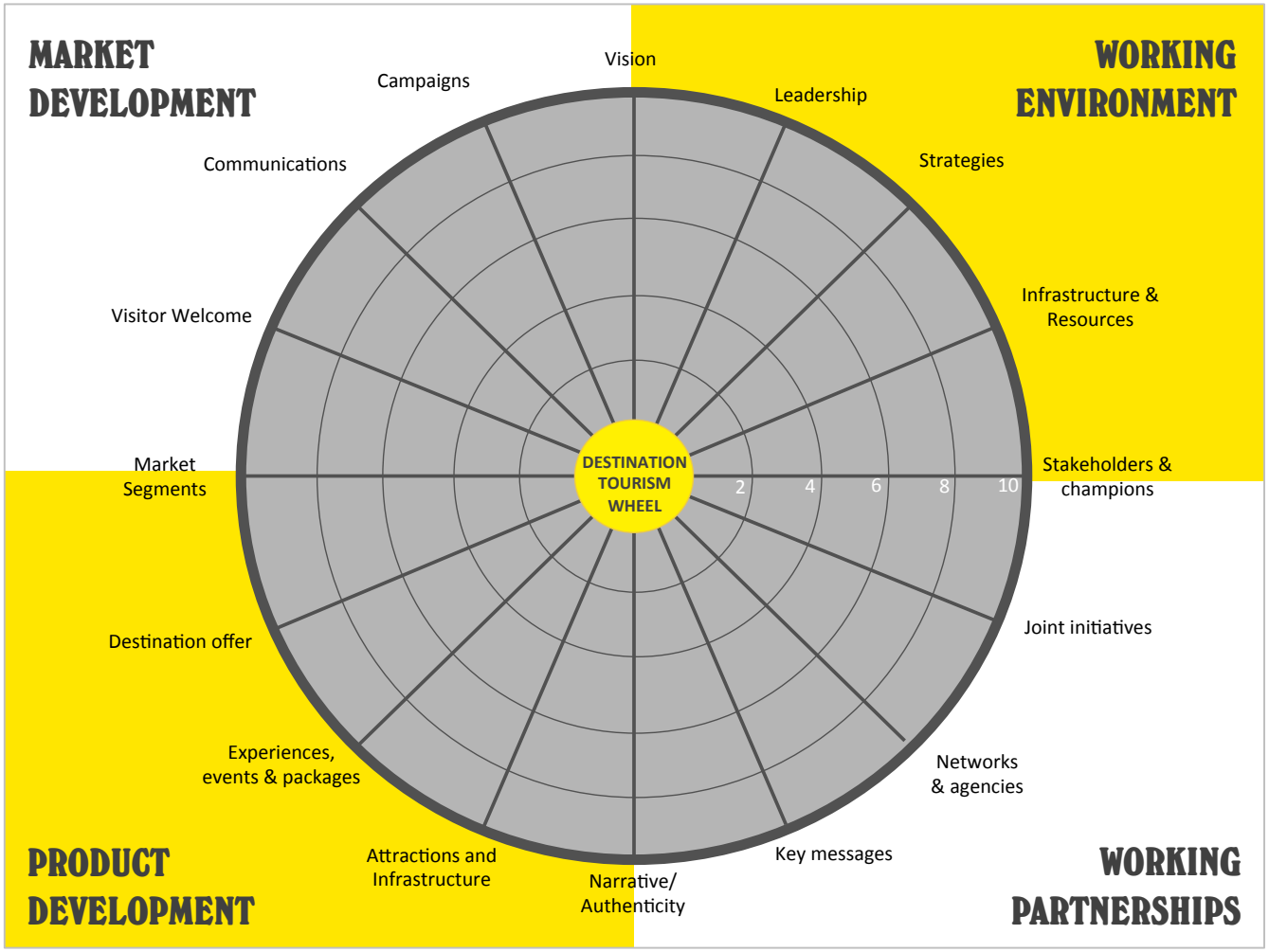
A 360° perspective

It has four main categories, each with four sub-sections:

1. *Working Environment* – It all starts with a vision, and the strategic infrastructure to drive that vision forward.
2. *Working Partnerships* – The networks, consortia and shared objectives that will drive progress across a destination.
3. *Product Development* – A strong and diverse offer is the starting point, but it is the whole experience that counts.
4. *Market Development* – Deliberately the last section, reflecting the strategic development across Cheltenham's partners that is required to support marketing, packaging and campaigns.

The *Destination Tourism Wheel* allows presentation of a clear profile of the critical building blocks: where you are now, then overlaying where you want to be, say, in five years' time.

This outcomes proposition is based on analysis using this model, from the research findings through the outcomes and finally within the action plan. The model is graphically represented below.



Destination Wheel, © Creative Tourist Limited

THE BIG QUESTIONS

The audit process set a number of key questions, which were posed to a wide range of stakeholders and interested professionals, as well as analysed through existing research, studies and metrics.

Working environment

- How important is/could tourism be for Cheltenham? What could tourism offer the wider economy of Cheltenham?
- What outcomes could tourism partners leverage for Cheltenham through a strategic approach to tourism?
- Where are the natural or potential areas of critical mass in tourism for Cheltenham?
- What products/offers deliver or could deliver for the tourism market, e.g. the assets? What could be added to enhance Cheltenham's tourism offer in 5 years' time? And regionally?

Working partnerships

- How important is the relationship to surrounding areas such as the Cotswolds, Forest of Dean, Gloucester (all have DMO organisations – see Addendum G)?
- How can the town work together most effectively to deliver successful tourism development and growth? What could/should the role of the key tourism 'players' be going forward?
- How can Cheltenham be articulated and presented as a tourism offer for non-residents, and what might want to change in this?

Market development

- Which potential (new/emerging) markets could Cheltenham engage with and have any barriers been identified?
- Where are the market opportunities? What niche markets might be attracted to Cheltenham's tourism offer?
- How connected, developed and future-proofed are the town's respective digital tourism platforms, and how well do they engage with visitors and potential visitors?
- What can Cheltenham learn from current competitive practice in the marketplace?

Product development

- What is the personality of the town in general tourism terms – from visitors and non-visitors?
- What personality traits might best sum up the public face of the town in 2015?
- How does this change when repeating the exercise for where the town wants to be in 5-years time?
- What might the voice of the town's tourism sound like?

- What product development might be necessary to keep visitors coming and coming back?

Market development

- If we were setting targets to measure success, what would they be? What would success look like – in marketing, product development, infrastructure and practice terms?
- What are the markets that are important, and potentially important/emerging, for Cheltenham?
- How strong and consistent is the visitor welcome to the town from all points of physical and virtual, official and unofficial, points of contact?

Summary of situational analysis

The findings are configured within the CTC destination wheel model – which brings both an analytical and presentational coherence. This distinctive model allows CTC to develop the key connective issues in a strategic context as we develop the full outcomes proposition.

Findings are intended to be constructively challenging, and should be taken in the context of a situational analysis, where gaps in provision, barriers to achievement, internal and systemic weaknesses and external challenges have been actively sought out. The following sections of this document take these findings into a wider analytical context, resulting in the foundations of the full strategy, articulated through indicative recommendations.

DELIVERY VEHICLE OPTIONS

It is critical to shape the goodwill of the local networks and players into practical and action-oriented partnerships, spanning Cheltenham Borough Council, the Cheltenham Trust, Tourism Partnership Group and BID, as well as Cotswolds DMO, and potentially other partners, delivery vehicles and consortia. The Tourism Partnership Group brings in further active stakeholders including the University of Gloucestershire, business community, The Jockey Club and Cheltenham Festivals.

The context then is of the 10-year commitment to The Cheltenham Trust to deliver Cheltenham's tourism services, the consideration of additional investment into Cotswolds DMO, Marketing Gloucester's impact nearby, and future investment potential through a BID and the LEP. Cheltenham needs a short-term plan and a longer-term delivery model. How could this fit together in a model for Cheltenham?

The Tourism Partnership Group can define its purpose and role within the town more effectively as the Tourism Task Force.

How will this work?

- The proposed name change for the Group seeks to align tourism within economic development, which is important within the context of the Council's strategic leadership in this area, but also in engaging key stakeholders, notably GFirst LEP;
- The Task Force will retain the same membership as its earlier iteration of the Tourism Partnership Group, but with the inclusion of a representative from Cheltenham Development Task Force;
- The Task Force can then review its previously defined remit in the wider context, for example how strategic economic development plans at a county level and the potential Business Improvement District for Cheltenham town centre. It is not envisaged that this will change significantly.
- A representative from the Tourism Task Force could formally join the Cheltenham Development Task Force, if representation does not already do this.

Sub-regionally, the links with Marketing Gloucester to elevate the offer from the Forest of Dean to the Cotswolds is also desirable and further discussions are required to progress this objective. Marketing Gloucester could be invited to become an associate member of the Tourism Task Force, subject to further discussions. By promoting the collective offer, the engagement nationally and internationally through VisitEngland and Visit Britain campaigns and with private operators will be much more manageable (note that VisitEngland will be subsumed back into Visit Britain this year).

So what are the current delivery vehicle options?

Rationale	Case for	Case against	Summary
1. Status quo.			
Partners continue to work together piecemeal and through the established networks. The overlap in potential roles and provision is managed through the forum of the Tourism Partnership Group.	The strategic leadership role is clearly with the Council, and the Trust can continue to develop its tourism services, working with the (also very new and eager to engage) Cotswolds DMO.	– The lack of formal agreements and public/private management and control is limiting in terms of sub-regional partnerships, effective working practice and attracting investment. It also leaves open conflicting marketing activity across stakeholders and agencies. – This option will not address any of the Big Questions outlined earlier, with very limited working partnerships in place and still not creating the appropriate working environment to deliver an effective and successful tourism visitor economy.	The need to develop strategically as a town has been accepted, so the current approach can only be transitional.
2. Consolidate into one arms-length management company (ALMO) for Cheltenham's tourism.			
The tourism function, spanning planning to delivery, is 'under one roof', bringing research, development, campaign and other functions together.	– Better communication regionally, nationally and internationally, as well as the credibility to attract partners and investment by being the clear lead body. – A public/private model, similar to	– The lead role of the Council, in terms of strategy and coordination, is needed for the next phase as partnerships are established and the first phase of development activity is devised, undertaken and	A potentially longer-term objective, and one that needs to be reconciled with Cheltenham's relationship with the Cotswolds. Staged integration is desirable towards this structural end.

	Marketing Gloucester, also means more flexibility to operate in the market. The product link between town and country would be enhanced. – This would provide the working environment for success through leadership and vision, and an agreed working partnership approach to planning and delivery.	reviewed. – It is unlikely that a single agency model is financially feasible in the short-mid term. With two existing DMOs already in the region, this may result in duplication of effort in the short-term, and particularly for partners and members who may be asked to join another ALMO that is likely to require financial commitments, as the ALMO would need to raise funds to deliver work programmes.	
3. Create a local Destination Marketing Organisation for Cheltenham.			
A likely expansion of the functionality of The Cheltenham Trust within its tourism services remit, to closely dovetail with the Cotswolds DMO.	– Can work more closely with key local partners to encourage the adoption of a positioning for Cheltenham, uprating skills (from service to information and digital). – Would provide clarity internally within the town regarding the breadth of its tourism remit. – Provides a stronger strategic link between Cotswolds DMO and Cheltenham than currently. – Could provide joint marketing opportunities with Cotswolds and	– Likely to be superseded regionally and beyond by Cotswold DMO, so would in effect be a function of that organisation's priorities which are sub-regional. – Potential for duplication of effort between Cotswolds, Cheltenham and Gloucester. – Potentially confusing for Cheltenham members who are already members of Cotswolds DMO – would they be asked to pay membership twice?	The relationship between the Trust and Cotswolds DMO is central, but replicating functions locally and sub-regionally is not advisable.

	Gloucester. – Opportunity to share resources around shared needs, e.g. research and evaluation.	– Focus on marketing and promotion rather than market and product development.	
4. Merge tourism functions for Cheltenham and the Cotswolds.			
As with option 3, but merging the remit of Cotswolds DMO with a Cheltenham-led organisation or department, e.g. Council, Trust, subject to discussions and possible commissioning.	– Cheltenham would be at the heart of the Cotswolds DMO narrative – the product link between town and country would be enhanced. It could also increase the ability to broker partnerships and investment. – Cheltenham has a stronger say in programmed delivery for the Cotswolds DMO. – Cheltenham would become embedded in the work programmes of the Cotswolds DMO.	– Other parts of the DMO territory may see a lead role in/for Cheltenham as a threat to their market profile and the traditional positioning of the Cotswolds. It would also take detailed review and negotiations to model this to all partners' satisfaction (e.g. other authorities, DMO members). – There would likely still be financial requirements for Cheltenham to support this DMO, not just with in-kind support. – Despite the Cotswolds being known nationally and internationally as a tourism destination brand, there are still many voices in Cheltenham that would need to be convinced that this was the most effective route forward, before this could be put in place.	A lot can happen in the five years of this strategy, and this may well be a viable route forward. For 2016 it is not feasible, as it requires particular investment and significant contractual changes.

5. Evolve the roles of the lead partners with a transitional plan.			
A phased plan, whereby the Council takes a lead to drive the strategy forward in the first phase, with the intention to create a sustainable partnership that enables them to potentially devolve the tourism development function to key partners. The Tourism Partnership Group would model itself on the established Development Task Force approach used for economic development – a Tourism Task Force that will then automatically feed into this wider economic agenda. The Task Force would be chaired by the new Director of Place and Economic Development (Cheltenham Borough Council).	– Cotswold DMO can build closer links with the town and Trust, creating a stronger tourism base regionally from which to build partnerships and leverage investment. It allows for systems, research and integration to happen in the first 1-2 years, alongside ongoing tourism marketing communications and service provision. It allows for the Task Force model to be applied to tourism and the Council retains its oversight role as the lead 'place-maker' for the town. – Provides a clarity regarding leadership, with a designated strategic lead in the Council (Economic Development) supported by the Tourism Task Force and the delivery agent being the Cheltenham Trust. – Identifies the importance of tourism to the town. – Provides a structure for partners to not only engage in tourism but to be	– It lacks the impact of a Marketing Gloucester model but does not require the same level of investment. – In order for this to address the Big Questions outlined earlier, there will still need to be additional investment to enable the Tourism Task Force and the Cheltenham Trust to deliver more than its existing function. – Would still need to agree a formal agreement with Cotswolds DMO for partnership working. – Without an agreed work plan and allocated resources this could just be adding in an additional layer of bureaucracy. – Danger of the Tourism Task Force becoming a 'talking shop' rather than a proactive working group.	An approach that allows for managed growth and review in a timely and realistic manner. It allows for developments to inform forward planning without committing to a major investment at the outset, thus keeping flexibility for new commissioning and partnership building as required and as opportunities arise. The additional leadership from the Director of Place and Economic Development is significant not only as it provides a senior lead from the Council, but also as this role has direct responsibility for economic development, licensing and tourism matters.

	actively involved in shaping and ensuring its development. – The Tourism Task Force can inform, contribute to and agree priorities for the town and work to leverage additional resources to support delivery. Each member will have a responsibility to engage and represent their grass-root networks and communities/memberships, e.g. individual businesses.		
Concluding recommendation.			

To meet the ambition and potential of the strategy, and recognising the financial challenges, a more devolved model is recommended – **option 5**. Realistically there is not the same level of resources available nationally, regionally or locally as there has been historically for tourism delivery vehicles and this is not likely to change in the short-mid term.

Therefore collaboration through partnership working with a strong strategic lead and identified delivery agent is a more realistic option as the delivery vehicle for tourism in Cheltenham. In order to generate a more cohesive, joined up and proactive approach to shaping the tourism economy, Cheltenham needs to quickly assemble a delivery vehicle that is fleet of foot with the power to make things happen and to effect change. Spending more time and resources to set up a potentially unwieldy new tourism agency would be going against the national trend of fewer Destination Management and Marketing Organisations with public sector funding contributions. The Tourism Task Force becomes a valuable collaborative engine for ideas generation, leveraging additional resources, driving forward town and region wide partnerships and overseeing the Cheltenham Trust and the tactical delivery vehicle. This vehicle may of course be shaped through one of the existing partners, an existing or new consortia, or new construct or supplier. Further examination of the financial models will inform detail, but the roles and responsibilities can be set out through formal and informal agreements using the above chart as a starting point.

KEY FINDINGS

These findings represent a good consensus of informed stakeholder opinion, supported by the wider data and literature review. This provides their provenance in terms of a shared approach for a town-wide plan and also the subsequent recommendations and outcomes that flow from them. The study has worked within a number of limitations to available data due to historic gaps in data collection and market research.

Working Environment	
This section addresses tourism vision, leadership, strategies, general infrastructure and resources, capital and otherwise.	
Finding	**Baseline data/evidence**
Vision. – There is a town-wide will, now requiring focused ambition around a shared vision for the development of its tourism offer, supported by relatively open dialogue between key stakeholders. – There is an understanding of missed opportunities rather than failing, in terms of previous plans, fragmented delivery and partnerships. This supports an 'in principle' understanding of the need to avoid 'quick fixes' in favour of "sustainable solutions". ***Indicative recommendation.*** – Commit to carry forward the tourism development agenda.	Extensive consultations across town and sub-region, including Tourism Partnership Group
Leadership. – Tourism management is spread across a number of key partners alongside the Council, including The Cheltenham Trust and the two relevant DMOs (Cotswold and Gloucester). The LEP does not have a strong focus on tourism since it devolved responsibility to the DMOs (primary focus on The Cotswolds, Forest of Dean and Wye Valley), but this could change, notably within a wider economic development context. – The Council has a unique overview of tourism as it relates to other agendas for the town – economic	Extensive consultations across, Council senior management and executive, town and sub-region, including Tourism Partnership Group; Council contracted agreement with The Cheltenham Trust; Council-funded constitution of Cotswold DMO;

development, transport & infrastructure, health & wellbeing etc. ***Indicative recommendation.*** – Cheltenham Borough Council to continue a strategic leadership role, working with partners to approve and monitor the key targets and Key Performance Indicators (KPIs) that flow from this proposition, delivered day-to-day by a new tourism coordination role in the immediate term. – Further define the Tourism Partnership Group's role in tourism development: driving the ambition but also working with the wider sub-regional tourism management network, e.g. Marketing Gloucester, Cotswolds DMO, The Cheltenham Trust. – In the mid-term, seek to source a more devolved structure for tourism delivery (built on agreed key roles and responsibilities); embrace key partners in a new Tourism Task Force, which will be tasked with delivering the agreed priorities; ensure that existing assets and partnerships are better used and exploited; and with create a more dynamic cycle of self-sustaining activity and investment. – Align the Tourism Partnership Group with the Development Task Force, creating in effect a focused Tourism Task Force. – Tourism can be clearly identified and incorporated into aligned Council strategies, e.g. economic development.	GFirst LEP Strategic Economic Plan for Gloucestershire.
Strategies. – There is a shared opportunity to generate new revenues from tourism business activities. – Economic development (sub-regionally) offers tourism a strategic route forward, based around the local authorities and two DMOs. – Improved (transport) infrastructure could have a massive impact over time, especially gateways. ***Indicative recommendation.*** – Ensure that tourism development is embedded into place and economic development planning for Cheltenham.	Extensive consultations across town and sub-region, including Tourism Partnership Group; Council contracted agreement with The Cheltenham Trust; consultation with Cotswold DMO; Cheltenham Transport Plan 2015; GFirst LEP Strategic Economic Plan for Gloucestershire; Cotswolds Tourism Marketing Strategy 2013-15; Cheltenham Tourism Economic

	Impact Assessment for 2006.
Infrastructure & resources. – A business and public sector balance exists on groups and boards but the private sector are not very active collectively. There is potentially a lack of tourism "big hitters" to drive things forward (except for Cheltenham Racecourse). ***Indicative recommendation.*** – Ensure membership of the Tourism Partnership Group retains major stakeholders e.g. The Jockey Club, University of Gloucestershire, and develop a working remit that reinforces this.	Extensive consultations across town and sub-region, including Tourism Partnership Group, Chamber of Commerce and The Lucky Onion Club; South West Region Racecourse Profiling 2008-13, Carat; Annual Survey of Visits to Visitor Attractions 2010-14, VisitEngland.

Working Partnerships	
This section addresses stakeholders, champions, joint initiatives, networks, agencies and shared key messages, informing branding.	
Finding	**Baseline data/evidence**
Stakeholders & champions. – Recent tourism investment has been notable in Gloucester, with strong campaign and events activity. – Tourism can help to create ambassadors – word of mouth for new visitors; to live and work here. – Residents are important stakeholders as well as potential beneficiaries. Resident impact and benefits require data, which does not currently exist. But we can demonstrate from comparators the positive role and impacts. – GCHQ – not actively involved to date but a major business tourism driver, and potentially a creative/technological partner. ***Indicative recommendation.*** – Continue to pursue tourism development links across county, notably Gloucester. – Monitor progress of Cheltenham BID to link resident and visitor offer (promotion, events etc.). – Invite GCHQ to meet/attend Tourism Partnership Group.	Extensive consultations across town and sub-region, including Tourism Partnership Group; Cheltenham Town Centre Footfall 2014-15; The Value of Tourism Report for Gloucestershire 2010; Great Britain Tourism Survey 2009-2014 VisitEngland; Great Britain Day Visits Survey 2011-15 VisitEngland.
Joint initiatives.	Extensive consultations across town

– Cheltenham has not engaged consistently (and at a sufficient level) with regional partners at a strategic or tactical level – marketing, data/research, information, planning etc. – There may be an opportunity to discuss relocating the Cotswolds DMO in Cheltenham. Cotswold DMO has a (limited) history of shared working but does see Cheltenham as a key partner. – The University is a potentially important partner, but is currently not sufficiently engaged. Thinking more niche, similar could be said of Cheltenham Ladies' College. ***Indicative recommendation.*** – Continue to pursue tourism development links across county, notably Gloucester. – Progress discussions with Cotswolds DMO regarding office location and working relationship with Cheltenham Borough Council and the Cheltenham Trust specifically.	and sub-region, including Tourism Partnership Group, Cotswolds DMO; Cotswolds Tourism Marketing Strategy 2013-15; Cotswolds Tourism Partnership Marketing Plan 2015; A University for Gloucestershire: Our economic, social and cultural contribution.
Networks & agencies. – Without dedicated tourism staff, ring-fenced budgets and a focus on generating further funding and investment, the potential outcomes are seriously limited. – The relationship with the Cotswolds DMO is open and potentially central, albeit underdeveloped to date, limited to areas including partial information and limited data sharing. ***Indicative recommendation.*** – Commit to leading tourism agenda through a new tourism management role/post. – Progress discussions with Cotswolds DMO data management (collection, sharing, reporting, research).	Extensive consultations across town and sub-region, including Tourism Partnership Group, Cheltenham Trust, Cotswolds DMO; Cotswolds DMO; Cotswolds Tourism Marketing Strategy 2013-15; Cotswolds Tourism Partnership Marketing Plan 2015; Cheltenham Borough Council Tourism & Marketing Strategy 2011.
Key messages. – Cheltenham can be more competitively distinct, festivals aside. – Branding (not a new graphic logo) could "help to bring together the current fragmented state of affairs around tourism for wider economic benefit". – Cheltenham is yet to be fully reconciled with the wider Cotswold brand. There is some split opinion on whether to "go with Cotswolds" or try to be more distinctive about Cheltenham (hotels, retail, activities, events etc.). There is potential for an individual positioning and a positioning as part of the Cotswolds and these may be connected but distinct.	Extensive consultations across town and sub-region, including Tourism Partnership Group; Cotswolds Partnership Marketing Plan 2015; Great Britain Tourism Survey 2009-14 VisitEngland; The Cotswolds Perception & Awareness Research 2012 Arkenford; Strategic Framework

– The place-making agenda is not yet prevalent in the Cotswolds brand – a place to live and work. Cheltenham has a lot to offer in this respect. Alongside it being a priority area for the town itself, this focus should inform and complement national and international communications and campaign activity with the travel trade – a consistent and galvanising narrative for Cheltenham and the region. – Advocacy activity around the strategy will be increasingly important. – Tourism must be seen as an asset for wider economic development, so the case for investment (and ROI) is important to develop, linking across sectors and initiatives, and building on previous economic development reports. ***Indicative recommendation.*** – Through a brand development process, explore Cheltenham to differentiate itself from others with the following as a potential starting point for a commissioning brief – *Contemporary (inland) resort with culture and ideas at its heart*. (This is not a strapline, nor is one being recommended.) Develop a consistent brand image – outward facing, confident, ambitious, surprising and contemporary. This can inform everything from campaigns to signage schemes. – Develop this in context of (influencing) the Cotswold brand, but retain independent voice as well. – Develop a narrative for Cheltenham's year round offer to consistently communicate. – Factor in the quality of life attributes into brand development and key messaging. – Develop advocacy content/materials that partners/stakeholders can use to support strategic outcomes. – Assess data capture/research needs within an economic development context.	for Tourism 2010-20, VisitEngland; The Value of Tourism 2010 Report for Gloucestershire; GFirst LEP Strategic Economic Plan for Gloucestershire; International Passenger Survey, Office for National Statistics 2010-14; South West Area Profile Report, The Audience Agency.

Product Development	
This section addresses the narratives for Cheltenham, its attractions, venues and tourism infrastructure, the experiences, events & packages on offer, and the wider destination offer.	
Finding	**Baseline data/evidence**
Narrative/authenticity. – Distinctiveness is largely found in the cultural offer – notably the main festivals. Second-tier festivals	Extensive consultations across town and sub-region, including Tourism

are not included in the communication of the offer at present. "It is the critical mass that delivers the market value." – The year-round offer is not especially clear or well articulated to the market as a result and there is a lack of clarity about gaps in the current provision. – Cheltenham has been voted the best place to live and grow up. The link between inward investment, education and tourism has not been exploited within a Cheltenham brand and there is not a strong year round family friendly cultural offering for visitors. – There is very little coherence around the articulation of Cheltenham's historic role as a spa town, either in a heritage and/or contemporary offer (e.g. trails, tours, special events, visitor experience). The Pittville Pump Room is an underused asset and could tell a town-wide spa story better. ***Indicative recommendation.*** – Assess the year-round cultural offer to assess strengths, potential 'hidden gem' assets and gaps.	Partnership Group; Daily Telegraph Top 20 Family Friendly places to live 2014; Sunday Times Top Places to Live 2014.
Experiences, events & packages. – The public realm is vital to delivering distinctive experiences – parks and gardens, the Regency and public buildings, streets, racecourse and open spaces around the town – many of these assets are under utilised for cultural activities and experiences. – The variety of events, venues, heritage, culture etc. are quite disparate and have yet to come together to contribute to a coherent and consistent presentation of the offer. The 'town in a park' idea (not strapline) is as strong as any to date, although the Cotswolds link is also valuable, as well as the wraparound offer (hospitality). – Connectivity between town and the Races can be more fully realised – information, campaigns and itineraries for visitors to engage with, stronger links with the retail and hospitality offer in the town to create more of a festival buzz. ***Indicative recommendation.*** – Review key public realm (creative) usage potential and investment needs for event/visitor-focused programming, including how spaces/zones can link and work together. – Review opportunities to tell Cheltenham's stories more effectively, e.g. programmes of activities that	Extensive consultations across town and sub-region, including Tourism Partnership Group; Liverpool case study regarding Aintree; The Cotswolds Awareness and Perceptions Research 2012, Arkenford.

might appeal to a funder such as the Heritage Lottery Fund that delivers sustainable and distinctive product offers.	
Attractions & infrastructure. – The Wilson launched successfully, and now seeks to establish itself as a national quality gallery. – Heritage is strong but not competitively outstanding – the town does not have an iconic building, a great river, a cathedral, a focal point like a harbour/quays. – Navigation, lighting and signage strategy can support packages and itineraries to showcase the town – cycling, walking, waterways, events and festivals. – Visitor research/data is partial in recent years. – There is no major business or conference centre/arena, but there are under utilised assets for the small to mid-scale MICE (meetings, incentives, conferences, events) market that could help to create a more distinctive and lucrative business tourism offer without placing pressure on the town's transport and services infrastructure. ***Indicative recommendation.*** – Explore through brand and information development how the townscape programmes could enhance the visitor experience. – Commit to establishing benchmark visitor data for the town, linking with partner research and evaluation programmes and forward planning. – Developing a major business or conference centre is not a viable option due to nearby competition from cities such as Bristol, Birmingham, Cardiff that have major facilities and supporting infrastructure.	Extensive consultations across town and sub-region, including Tourism Partnership Group; Annual Survey of Visits to Visitor Attractions 2010-14 VisitEngland; The Value of Tourism 2010 Report for Gloucestershire; The Cheltenham Borough Tourism Economic Impact Assessment for 2006.
Destination offer. – Hospitality capacity around major event/business tourism is not yet comprehensively surveyed. – Gloucester is creating new reasons to visit and return through new events. Cheltenham and Gloucester miss opportunities to work together, though Gloucester is willing and keen to do so. – There is a consensus to offer a more vibrant, contemporary offer without ignoring the heritage and	Extensive consultations across town and sub-region, including Tourism Partnership Group, Marketing Gloucester[9]; Cheltenham Festivals Impact 2014; The Value of Tourism

[9] Very brief outline conversation, requires further consultation

public realm assets – in fact, using them more creatively in programming. – Can the new Cheltenham play on the old 'come and relax, take the waters' offer but in an innovative and contemporary context? – The nighttime economy is quite mature, albeit not to all markets' tastes. – The recently relaunched Cotswolds DMO website (cotswolds.com) has uprated the coordinated marketing resource to a degree. Further investment could make significant impacts, and exploit potential economies of scale across digital platforms. – Some of Cheltenham's major festivals can justify international status – which impacts propensity to travel to attend. – Retail is evolving, with some new developments confirmed. The quality independent hospitality offer remains an opportunity to be distinctive. – The reliance on third parties, from the Racecourse to buses and taxis for visitors using public transport to enter the town, is a factor for the visitor welcome at the many gateways to Cheltenham. ***Indicative recommendation.*** – Assess the year-round cultural offer to assess strengths, potential 'hidden gem' assets and gaps, including joint programming, e.g. working with other destinations like Gloucester, in the context of the independent, quality 'wraparound' hospitality offer. – Conduct a series of small, specialist digital audits to review SEO code, SEO content, links, social media, email, mobile and seasonal trends on key websites. – Explore options for a visitor welcome training programmed providing concierge/host style training for bus and taxi drivers alongside the culture, attractions, hospitality and retail sectors.	2010 Report for Gloucestershire; Cotswolds Tourism Marketing Strategy 2013-15; Cheltenham Town Centre Footfall 2014-15; Cheltenham BID Draft Business Plan 2015; Estimates of Station usage 2013-14 Cheltenham Spa Station; Digital Audit (technical study and visitor journey), 2015 Creative Tourist; New York Times Travel section, 13 January 2016.[10]

[10] http://mobile.nytimes.com/2016/01/17/travel/england-cheltenham-festival.html?_r=1&referer=http://m.facebook.com

Market Development	
This section addresses the target markets (current and emerging), the visitor welcome from the town, its communications and campaign activity. This flows from previous sections as part of the strategic planning and delivery cycle, so will have less specific insights and recommendations as a result.	
Finding	**Baseline data/evidence**
Market segments. – The offer for couples/empty nesters offer is better, business tourism is solid at the small to middle scale (MICE – meetings, incentives, conferences, exhibitions). GCHQ delivers business tourism year round. A younger market could potentially be developed – in and out of the town. (Tour of Britain for example, and its legacy to build Cheltenham as a cycling hub.) – Cheltenham undersells as a family destination but needs more family friendly product and packaging. – There is recognition of the need to internationalise the tourism focus in relation to the scale, scope and vision for the town and especially the region, e.g. articulating an offer in relation to the Arts & Crafts movement, linking to regional partners. ***Indicative recommendation.*** – Continue to focus on the MICE business tourism market, reflecting the strengths of the hospitality offer. – Explore package development (inc. with Cotswolds, Gloucester partners) for families, young people, and targeted international markets.	Extensive consultations across town and sub-region, including Tourism Partnership Group; The Cotswolds Awareness and Perceptions Research 2012 Arkenford; South West Region Area Profile Report, The Audience Agency; Strategic Framework for Tourism 2010-20 VisitEngland.
Visitor welcome. – The physical visitor welcome is disjointed and in some areas out-of-date. – The tourist information centre is not in the perfect location at The Wilson, although this is only a part of the bigger issue of the joined-up visitor welcome across the town and its gateways. – The Races welcome race-goers, but the town and The Jockey Club could be more strongly engaged. Both seem to want this to happen. – The major Cheltenham Festivals' audiences have been described as "the BBC Radio 4 audience made flesh". This is a good market, but there is a case for more diversification, and engaging with the town	Extensive consultations across town and sub-region, including Tourism Partnership Group; Digital Audit (technical study and visitor journey), Creative Tourist 2015; Cheltenham Festivals Impact 2014; South West Region Racecourse Profiling 2008-13 Carat.

more. ***Indicative recommendation.*** – Explore how to develop consistent informational and promotional content online, in print, through tourism partners and stakeholders and across infrastructure. – Align with townscape and infrastructure programmes to maximise synergy across signage etc. – Commit to a physical upgrade of the TIC to improve the visitor welcome and explore additional pop-up and gateway initiatives. – Explore where major cultural programming can develop new audiences relevant to the visitor economy.	
Communications. – Cheltenham as a whole has imbalanced, uncertain partnerships and a conservative vision, positioning and destination ambition in digital terms. Given most tourist visitors will experience the town digitally long before they will ever experience it physically, this is a critical area to get right. – Visit Cheltenham website ranks well currently; content and positioning could be stronger, as well as links with partners across the town and region. – Weaknesses in the partnership infrastructure show up in fragmented and isolated digital practice. – In terms of authority, Cheltenham Racecourse is a brand of international significance; through its website and through social media, it has access to a larger audience than all other Cheltenham-based partners combined. – Cheltenham Festivals similarly dominate the cultural digital space, with its strong brands and network of powerful influencers giving it ready access to a national online audience. But again, even in the cultural sphere, the local venues and wider destination offer are missing almost entirely – yet they have much to offer in terms of year-round traffic, traction and destination relevance and narrative. – The major cultural festivals do not link with other cultural festivals and events so there is no distinctive year round festival and event positioning. – Will the UK staycation market continue – what are the relevant market trends to exploit or mitigate against?	Extensive consultations across town and sub-region, including Tourism Partnership Group; Digital Audit (technical study and visitor journey), Creative Tourist 2015; Beyond Staycation October 2015 VisitEngland; Domestic Leisure Tourism Trends for the Next Decade, December 2013 VisitEngland; Visit Britain 2016 Forecast; International Passenger Survey, Office for National Statistics 2010-14

Indicative recommendation. – Conduct a series of small, specialist digital audits to review SEO code, SEO content, links, social media, email, mobile and seasonal trends for key websites. – Commit to establishing benchmark visitor data for the town, linking with partner research and evaluation programmes and forward planning. – Work through the Tourism Partnership Group to build information and data sharing where possible, including forward planning/programming – across public and private sector partners/networks. – Explore how lead partners can invest (very modest funds) in editorial on their websites that represent their own offers better by promoting Cheltenham's wider visitor offer (e.g. bespoke content, itineraries, packages, for example The University of Gloucester's 'Discovering Gloucestershire' webpage). – Continue to build trust across the Tourism Partnership Group to encourage sharing of digital experiences/data and cross-promotional opportunities. Encourage more digital analytics as a group.	
Campaigns. – Offer for UK markets: retail, the events programmes, food & drink (can be much more developed). "A good day visit and as part of wider (Cotswolds) break." – Offer for international markets (e.g. Germany, USA, Netherlands, plus Japan, China): a lot to offer if promoted in the right way. Lot of traditional things to do, places to stay, good access. Quintessentially 'English'. The heritage could be developed more creatively. Cotswolds as a whole punches under its weight. – Hotels and accommodation (including rural camping and the emerging 'sharing economy' of AirBnB): Cheltenham Races' *Little Diamonds* website section of accommodation shows where capacity issues exist at peak times. – There is a lack of targeted, aggressive proactive domestic and overseas marketing (and budgets). ***Indicative recommendation.*** – Based on new market insights from benchmarked and shared data, agree UK and international markets and target through targeted campaign and communications activity.	Extensive consultations across town and sub-region, including Tourism Partnership Group; Visit Britain Market Insights; Inbound Tourism to Britain's Nations and Regions 2013 Visit Britain; Great Britain Tourism Survey 2009-14 VisitEngland; Great Britain Day Visits Survey 2011-15 VisitEngland; International Passenger Survey 2010-14, Office for National Statistics.

AN OVERVIEW OF KEY CHALLENGES & EMERGING OPPORTUNITIES

1. Ambition – being positive

Cheltenham can position itself as the culture & leisure hub of the Cotswolds (this is not a strapline or campaign in itself), where cultural venues and events combine with public realm, accommodation, food & drink and retail to supply the fully-rounded, modern offer that independent traveller markets look for – both domestic and international.

To do this, Cheltenham can:

- Secure its reputation as one of the must-go-to; get-out-of-the-capital-quick destinations in the UK – synonymous with one of the best known brands in UK tourism (Cotswolds);
- Get a bigger share of the 16m Cotswolds' visitors, especially short-break/extended stay (currently 82% are day visitors and anecdotal feedback from the accommodation sector is that very few guests stay for more than 2 nights – most stay only one);
- Be an essential ingredient for the Cotswolds offer, helping to develop new markets;
- Be a challenger brand[11] to Bath, Oxford and Stratford-upon-Avon – less obvious and over-run, more intimate, personalised, bespoke (all quality measures). In other words, for those in the know.

Extensive local consultation and analysis revealed that there is a shared sense that this is well within the town's grasp if addressed strategically. Tourism is vital as one of the biggest economic drivers for the town (alongside players like GCHQ and the University) – and that culture is the main draw enhanced by specialist retail and promising local food & drink.

There are a number of areas that can be improved to realise a shared ambition, across culture, festivals & events, use of public realm, hospitality, retail, food & drink, marketing & digital, research and evaluation – all contributing to building a strong, coherent and visible brand proposition for Cheltenham.

2. Vision – being clear

[11] A challenger brand is a product brand in an industry that is not the major brand/market leader. The term denotes the fact that such companies have to compete from a position behind the dominant player or leader in an industry. This makes the process of marketing significant to attracting customers.

Cheltenham requires a sharp and distinct offer to make an impact in a competitive market. A strong brand vision and framework will supply the clarion call, set the tone for change, and shape decision-making. It's not a strapline or a logo, but it can be more contemporary and edgy (rather than the local perception of being sleepy and laid back) whilst being true to Cheltenham. A single, galvanising vision did not leap from the research, but a number of insights did which this document will use to present a new positioning for Cheltenham.

Creative brand development through the work of The Cheltenham Trust, international fashion and style brand (Superdry™), and a nationally regarded hospitality brand (The Lucky Onion Club) already start to reveal how Cheltenham can project itself.

3. Strategic partnerships – being at the table

Cheltenham needs a progressive, strategic relationship with the Cotswolds DMO and Marketing Gloucester. The role of GFirst LEP is less well-defined, given their lack of focus on tourism to date since they devolved direct tourism responsibilities. This will switch emphasis from representation in tactical campaigns to joint strategic planning. This more structured, transactional partnership approach will be central to the growth of the visitor economy – who does/leads what, what activities are shared etc. from planning to delivery.

Cheltenham's distinct visitor offer will also be able to stand alone from tourism partners – even the Cotswolds – but also contribute fully to the richness of the county/sub-regional offer.

4. Planning – being focused

What are the priorities for making the visitor offer more market-ready? Where are the quick wins, pilot or kickstarter projects?

Infrastructure presents challenges for the visitor welcome – car and coach parks, bus stations/stops, location and staffing of Tourist Information Centre (TIC) etc. These are not being ignored, with the Cheltenham Transport Plan (focus on reducing town centre congestion) and Cheltenham BID (attracting people to the town centre) examples of this.

The Cheltenham Trust is a new organisation, with a culture, tourism and leisure remit that is necessarily evolving. Post-launch, a bold and imaginative use of The Wilson's collection and programme can build a level of visibility and reputation in the region with peers and audiences alike.

The Cheltenham Festivals are an established brand in their own right, and are seeking to continue to connect more with the town's offer, and therefore as part of a year-round narrative rather than a series of stand-alone events.

Target markets for growth include:

- Families, given the general family-friendly nature of the town. How can families be better welcomed and catered for, reflecting its status as the best place in the UK to bring up a family, and turning day visits (e.g. to the Science Festival) into a longer stay? The new Brewery facility will make a difference. So too will joint planning with Gloucester where the family offer is more strongly communicated.
- Younger people are not only valuable as visitors but link to the retention of graduates and attraction of a professional workforce. The hospitality industry is actively working to make Cheltenham a place where talented individuals can thrive and make careers (resisting the pull of London, Birmingham or Bristol). The University of Gloucestershire is a natural and willing partner to develop, with potential 'quick wins' available with open days, graduate days/shows, start/end of term/year when targeting VFR (visiting friends and relatives), alongside longer-term contributions to placve-making. The cultural and creative industries sector provides further support: creating a place where creative and innovative young people want to live, work and visit; creating more space for engagement with culture; creating more space for contemporary arts & culture to grow at the grassroots and become part of the cultural ecology – and then attracting fresh talent?

5. Leadership – being ready to deliver

It is essential that there are clear roles and responsibilities for all lead stakeholders – Cheltenham Borough Council, The Cheltenham Trust and the Tourism Partnership Group, plus the sub-regional DMOs – to accelerate activity, avoid gaps or duplications of effort, and build credibility as the delivery vehicles for the town's tourism.

The foundation for all of this is the Council, and their core role is to:

- Apply vision and set targets, with the requisite timeframes and milestones;
- Monitor performance and ensure accountability based on clear demarcation of roles across public and private sectors;
- Align internal Council activities, connected agendas (e.g. economic development, health & wellbeing, transport), and resources behind the strategy and deliver those with appropriate partners;
- Help to facilitate partnerships across the town, and therefore aggregate additional resources;
- Help to support the development of a consistent year round offer beyond the impressive festival activity peaks.

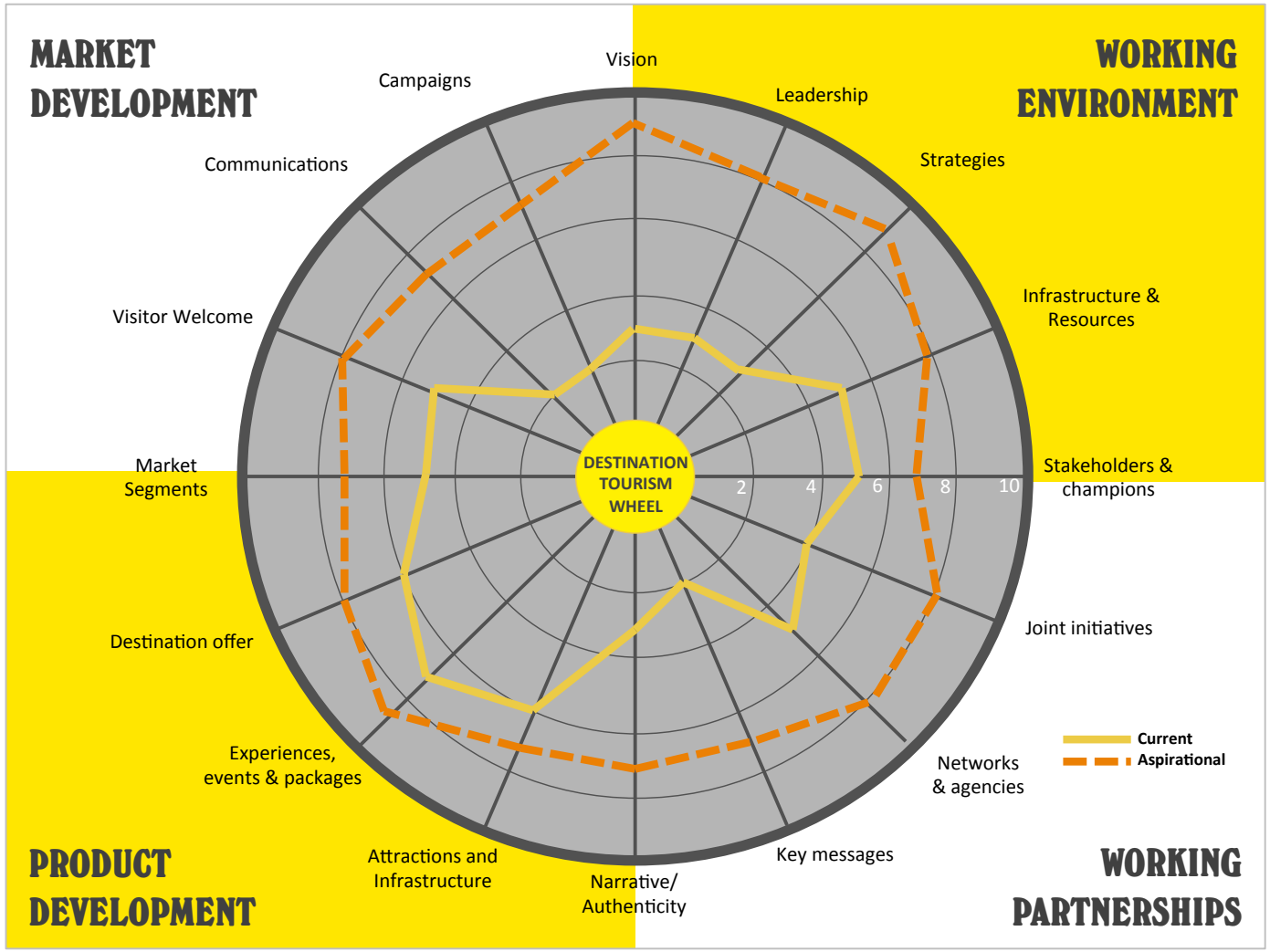
There are other benefits to this approach:

- It opens up other networks and potential sources of resource;

- It encourages new products and packages;
- It creates a structure for widespread adoption of key (shared) messages;
- It opens up new channels to the mix (e.g. University reach into international markets, hotelier PR and media agencies).

MAPPING THE MAIN AREAS OF FOCUS

The audit has revealed a strong consensus of informed opinion, both in terms of where Cheltenham is now in relation to tourism, but also where it could be looking five years ahead. This is represented by the following Destination Wheel, now populated. The solid yellow line denotes the current (late 2015) situation, and the dotted line charts the aspiration for how far Cheltenham can progress (by 2020) if it continues to work together and build on the foundations now being laid through the Tourism Partnership Group. This was developed through a series of workshops with the Tourism Partnership Group and a Cabinet Members Working Group.



This clearly illustrates a number of strengths and areas where Cheltenham can focus to improve its destination offer and grow its visitor economy.

Interpreting the Destination Wheel

1. Working Environment
    a. There is a perceived lack of (articulated) vision, but a strong sense that this is a straightforward process to rectify this with the engaged partners.
    b. Likewise, the collective will to address leadership is prominent, not least as new organisations are now in place including The Cheltenham Trust and Cotswolds DMO.
    c. The process behind this outcomes proposition is a clear indicator that (shared) strategic progress is underway.
    d. The town has a number of existing strong physical, organisation and event assets that are recognised, alongside the need to link them together more into a single offer. Resources are limited, but again joint working can start to attack that challenge.
2. Working Partnerships
    a. Most of the partners the town needs to drive its visitor economy are already 'at the table'. More sub-regional engagement will further enhance this, within a clear and active structure and working to a clear vision.
    b. There is a perceived opportunity to build on some of the initiatives, whether bilaterally or as a wider group.
    c. The Tourism Partnership Group is a fledgling body, but could take this agenda forward rapidly if its role permits.
    d. Cheltenham can do much more to use consistent messaging across a wide range of town, partner and third-party channels to convey the emerging offer.
3. Product Development
    a. The story that Cheltenham tells can be communicated more boldly and creatively, but needs to retain its core truths in terms of what the town and region has to offer.
    b. Cheltenham has an impressive built environment – from architecture to green spaces – and the packages and programmes can continue to make more of them.
    c. The programmed of festivals and events are very strong, and a year-round calendar assessment can add further layering and value to an offer already bursting with high-profile events.
    d. Cheltenham's offer is well-known in some respects to certain markets, but can be energised in others, as well as being more consistently presented.

4. Market Development
    a. Cheltenham does not have a hugely diverse set of target markets, but can grow existing markets and develop
    b. emerging markets more, especially when widening the packages to include other locations like the Cotswolds.
    c. The visitor welcome has had investment, but can be further refined, informed by operational lessons from the TIC for example. Gateways – both physical and digital – can be uprated with some investment.
    d. Communications have been relatively reactive and basic in recent years, but this is starting to change. More engagement, especially online, can accelerate this process.
    e. Campaigns are costly, and major events and regional platforms (which Cheltenham can buy into) have been the most active media campaigns recently, from paid search advertising to the London Underground. Joint markets for the region can inform cost-effective campaign activity.

Developing – aligned outcomes proposition

A DISTINCTIVE VISION

This proposition is about making Cheltenham a more attractive and dynamic place for residents and visitors alike. Cheltenham aspires to be one of the UK's most liveable cities, with residents and visitors inspired by its culture, food, public spaces, education and the diversity and quality of accessible experiences.

This report details how a more integrated year round visitor offer; a unified presentation of Cheltenham as a distinctive, contemporary place; and more effective delivery partnerships can help Cheltenham realise its ambitions to become a highly competitive pre-eminent tourism destination drawing in visitors, talent and would-be investors.

In support of those aims this strategy seeks to improve the quality, reach and effectiveness of Cheltenham's tourism offer to national and international visitors, and to enable residents to better understand and enjoy the richness of all that Cheltenham has to offer.

The strategy also seeks to be a vital foundation of wider economic development efforts for Cheltenham and the surrounding boroughs, enabling the key partners to come together in more effective working structures that will allow them to compete successfully for the necessary supporting investment vital to future product development and promotion.

Cheltenham's vision is to create a tourism offer that is:

- **Diverse** – The range and quality of visitor experiences accessible from Cheltenham is second to none in the region.
- **Differentiated** – Cheltenham is recognised and promoted as the cultural hub of the Cotswolds – a distinctive, welcoming, and captivating place.
- **Dynamic** – An enriched, joined up, culture-led tourism-friendly offer driving visitor growth, economic success and a sustainable cycle of ongoing investment.

OUTCOMES PROPOSITION

The timeframe starts from the 2016-17 financial year, but some activity may begin earlier, subject to funding confirmation. This is developed in the Action plan along with allocation of lead roles.

Primary outcomes	Secondary outcomes	Measure of success
Working environments		
Cheltenham's visitor economy is strategically and sustainably developed and supported.	There is a leadership and management model in place for Cheltenham tourism development and delivery.	Implement tourism outcomes proposition; increase in director-level and partnership communication and engagement.
	Core tourism development activity is invested in to support the strategic partnership process.	Increase capacity by creating capacity through a role as hub for activity.
	Cheltenham is fully integrated into the planning of future local aligned strategies, and regional Destination Management Plans (DMPs), notably the Cotswolds.	Integrate and manage tourism plans within Council depts.; increase in director-level and partnership communication and engagement.
	The role, responsibilities and authority of the Tourism Partnership Group in the context of strategy and delivery is defined as a new Tourism Task Force.	More regular Task Force and sub-group activity, with updated roles and targets.
	Tourism activity is managed and coordinated, developing systems that support the strategy, coordinate partnership building and lead tactical delivery, review and forward planning.	Increase information sharing; improve decision-making; more partners joining.

Primary outcomes	Secondary outcomes	Measure of success
Working partnerships		
Partnerships are active and dynamic in driving the vision and delivery	A series of clear, detailed partnership (transactional) agreements with key partners have been created that have a strategic and tactical impact on tourism management, development and	Increase in shared activity across research, investment, planning.

for tourism in Cheltenham.	performance.	
	All partners are invited to adopt a process akin to a simple memorandum of understanding.	Increase understanding and applications of contributing roles.
	Commercial businesses are worked with to encourage their involvement, e.g. retail, hospitality, tour operators, attractions, DMOs etc.	Increase in communications, campaigns, packages and products that include private sector involvement.
	A formal dialogue is developed with the University of Gloucestershire to explore market, research and product development opportunities.	Increase in University involvement in general tourism programmes; new initiatives and pilots developed.
	The opportunity to relocate Cotswolds DMO to Cheltenham is explored and progressed.	Establish a Cheltenham base for the DMO (subject to fit).
	The commitment to sustainable, accessible tourism is maintained.	Improve environmental impact; attract green tourists.

Primary outcomes	Secondary outcomes	Measure of success
Product development		
Refine and enhance Cheltenham's offer for visitors.	An analysis of the cultural and major events, packages and itineraries offer provides insight through a gap analysis for year-round product development opportunities.	Create new quality-managed products and packages (from all partners); present year-round programme offer; increase in formative evaluation to assess new product/event proposals; better application of shared resources; new investment from other sources to support product development.
	The tourist information centre (TIC) function at The Wilson and online is developed.	Increase in volume of visitor traffic (in person and online); improve visitor experience on site and online; increase cross-selling and information provision with attractions/partners.
	There is a positioning for Cheltenham that both complements the Cotswolds offer and stands alone for the town as a day visit and short-break destination.	Increase and improve market awareness and understanding; increase in visitor numbers and spend.
	Target markets are researched, informing product packaging	Increase in engagement with products and communications from

	development.	target markets; visitor numbers increase (infers increase in spend).
	There is more regular branded stakeholder (B2B) communications to the wider travel trade market, carrying news of tourism development and the evolving Cheltenham offer.	Increase in B2B engagement; increase in trade media coverage; increase in partner/third-party use of content.
	The brand positioning is applied to an updated visitor welcome online, offline and across town and its channels to market, working with partners to develop understanding, skills & messaging.	Increase stakeholder adoption; increase brand recognition; better consistency of use; increase third-party adoption.
	There are key itineraries published and promoted that target priority market segments, as part of a tourism content strategy.	Increase in usage of itineraries; increase in online traffic/download; increase in visitor numbers.

Primary outcomes	Secondary outcomes	Measure of success
Market development		
Grow the visitor economy through targeted marketing communications programmes & systems.	The digital infrastructure is designed and built to effectively manage sector communications across all platforms.	Increase online traffic, engagement and bookings; increase data capture, increase market insight; increase sales conversion and cross-selling; higher SEO; increase user generated content.
	There is a strategic approach to data capture and management, from research to campaign, connecting regional, national and international advocacy, media and stakeholder channels.	Increase data capture, improve partner engagement; increase joint promotional opportunities; increase media coverage; increase user generated content; improved success rate in funding bids.
	Cheltenham targets national and international tourism and specialist media to profile the town's offer.	Increase media coverage; more accurate ('on message') coverage.
	A shared calendar of major events, exhibitions, and activities is in use and up-to-date.	Reduce event clashes; reduce competing funding applications; increase cross-promotions and packages.
	There is a simple framework for reporting and sharing market and research data, campaign evaluation data, online metrics, idea generation and planning.	Increase (joint) promotional opportunities; improved market insight; more accurate planning; improved success rate in funding bids.

NOTE ON THE CASE FOR INVESTMENT

The National & Local Landscape – Place-Making and Co-Investment

This tourism strategy is incredibly timely for Cheltenham, the GFirst LEP, and other local and national development partners. An appropriately supported tourism strategy for Cheltenham can create significant co-investment opportunities over the next three years.

The most recent Spending Review settlement contained encouraging news for the tourism sector. The Chancellor committed an extra £40 million for English tourism to help visitors discover our hidden gems, as well as our crown jewels, beyond London. Furthermore, the Chancellor has also confirmed that the GREAT campaign will continue, with an increase of funding to £60 million a year.

However, VisitEngland will be subsumed back into Visit Britain and it is too early to know what impact that will have on destinations being able to access resources, support and partnering in campaigns.

Destination Management and Marketing Organisations across the country are either disappearing or restructuring as public funding sources of income decrease. All DMOs are being expected to deliver more for less and many are looking at developing new business models less dependent on public sector funding and more commercially focused. For example Cambridge has just launched (January 2016) a new Destination Marketing Organisation - Cambridge & Beyond - with a completely commercial model and no public funding.

The Department for Culture, Media and Sport is currently in consultation with regards to a new White Paper for Culture around four key pillars:

- Places: how culture brings together communities across the UK
- Funding: building financial resilience in cultural organisations and new funding models
- People: how people engage with culture and how to ensure everyone can access and experience culture
- Cultural Diplomacy: Working with cultural organisations to promote Britain abroad

There are also growing opportunities to deepen collaborative efforts with the GFirst LEP within the burgeoning devolution agenda being encouraged by the Government. The Gloucestershire Growth Deal (worth £62.5 million) announced last year, has the ambition to *'create a quality of working life recognised as the best in Europe'* as one of its priorities. This tourism strategy has framed its targets in ways that will enhance the life of residents across the region, helping to attract and retract talent.

The role of all the partners in delivering this tourism strategy is to ensure that Cheltenham works effectively with, and makes powerful investment cases to, its local and national development and investment partners.

This tourism strategy has therefore been designed to help the accountable delivery group to broker partnerships, and source investment so that:

- Cheltenham can become a recognised tourism jewel beyond London.
- And make a fuller contribution to LEP-led growth within the region by promoting Cheltenham as a vibrant and coherent example of place-making at its best, constantly refreshed, contemporary and vibrant. A compelling place to work, live and visit.
- Cheltenham has the potential to significantly increase its contribution to the wider region's visitor economy through job creation, tourism spend and national and international profile.

The ability to create a robust case for investment, whether for established funding sources or new funding opportunities via the public and private sectors, will rely on strong evidence of growth potential. As tourism is a cross-cutting theme it can, through effective partnership working, leverage resources from different sectors, but only if it can demonstrate measurable impact. This requires up-to-date research data that is as integrated as possible into aligned programmes, such as economic development.

Until Cheltenham has undertaken an assessment of its cultural assets across a calendar year and developed a cohesive strategic approach to its brand development and research, it will be difficult to know what Cheltenham needs additional resources to support and therefore which potential investment routes are most appropriate.

Delivering – an action plan

This section takes the identified outcomes forward into a series of outputs (actions) that will support the achievement of the outcomes. They have guidance costings where possible.

ACTION PLAN

The timeframes assume costed actions will begin from the 2016-17 financial year. Some outputs may be started prior to this, and priority actions are in **bold**. Baseline data predominantly identifies the measures, as benchmark data generally does not exist. A priority in the next 12 months will be to set meaningful performance targets. The investment implications are not intended to be solely secured from Council resources, but drawing creatively from the wider partnership, including in-kind resources. It is also important to state that the collaborative approach will make new sources of funding possible, and new sources of funding and applications are factored into the framing of this action plan.

Working environments						
Cheltenham's visitor economy is strategically and sustainably developed and supported.						
Outcome	**Action**	**Measure/target**	**Baseline (data)**	**Timeframe**	**Lead/support**	**Est. cost/source**
There is a leadership and management model in place for Cheltenham tourism development and delivery.	Confirm Council as strategic lead for 2016.	Approved in Cabinet and Tourism Task Force.	N/a	Apr-Jun 2016	Council, Place & Economic Development	N/a
Core tourism development activity is invested in to support the strategic partnership process.	**Recruit additional capacity to drive the programme forward.**	Successful recruitment of postholder.	N/a	Apr-Jun 2016	Council, Place & Economic Development; Tourism Task	£16-20k pa initial fixed-term contract; 2-3 dpw (further assessment

					Force	required)
Cheltenham is fully integrated into the planning of future local aligned strategies, and regional Destination Management Plans (DMPs), notably the Cotswolds.	Confirm Director level management of tourism and oversight of Task Force.	Cheltenham features in regional and national statutory tourism plans	Cheltenham references in plans.	By end 2016/17	Council, Place & Economic Development; Tourism Task Force	N/a
The role, responsibilities and authority of the Tourism Partnership Group in the context of strategy and delivery is defined as a new Tourism Task Force.	Update remit and participant roles & responsibilities; Connect with Development Task Force.	Effective contributions from Tourism Task Force in supporting outcomes.	N/a	Apr-Jun 2016	Council, Place & Economic Development; Tourism Task Force	N/a
Tourism activity is managed and coordinated, developing systems that support the strategy, coordinate partnership building and lead tactical delivery, review and forward planning.	Establish partnership communications and data management framework.	Established databases and communications activity to agreed volume.	Not yet in existence.	From Jul 2016	Council, Place & Economic Development; Tourism Task Force	N/a

Working partnerships						
Partnerships are active and dynamic in driving the vision and delivery for tourism in Cheltenham.						
Outcome	**Action**	**Measure/target**	**Baseline (data)**	**Timeframe**	**Lead/support**	**Est. cost/source**
A series of clear, detailed partnership (transactional) agreements with key partners have been created that have a strategic and tactical impact on tourism management, development and performance.	Negotiate clear terms where required with lead partners (see Addendum F/G).	Clear agreements signed-up to; Effective operational relationship and communications.	Not yet in existence.	2016/17	Council, Place & Economic Development, Tourism Task Force; Cotswolds DMO, The Cheltenham Trust, Marketing Gloucester, GFirst	N/a
All partners are invited to adopt a process akin to a simple memorandum of understanding.	Update and align Tourism Partnership Group (TPG) remit with Development Task Force model.	TPG reforms as Tourism Task Force; Develops roles to respond to outcomes proposition.	Not yet in existence.	Apr-Jun 2016	Tourism Task Force	N/a
Commercial businesses are worked with to encourage their involvement, e.g. retail, hospitality, tour operators, attractions, DMOs etc.	Task the Tourism Task Force to proactively develop this objective, with clear chairing.	Progress of agenda; possible pilot activity/ involvement in communications & campaign activity in 2016/17.	N/a	From Jun 2016	Tourism Task Force	N/a
A formal dialogue is developed with the	Instigate direct engagement to develop a shared agenda of	Progress of agenda; possible	N/a	From Jun 2016	Tourism Task Force	N/a

University of Gloucestershire to explore market, research and product development opportunities.	potential development opportunities.	pilot activity in 2016/17.				
The opportunity to relocate Cotswolds DMO to Cheltenham is explored and progressed.	Progress formal negotiations with new Director, Cotswolds DMO regarding relocation.	Final decision reached; Relocation instigated if that is decision.	N/a	By Sep 2016	Council, Place & Economic Development, Cotswolds DMO; The Cheltenham Trust	Potential setup support (IT etc.)
The commitment to sustainable, accessible tourism is maintained.	Ensure sustainable tourism is embedded in all programmes and planning.	Evidenced and referenced in all aligned strategies.	N/a	By Sep 2016	Council, Place & Economic Development; Tourism Task Force	

Product development						
Refine and enhance Cheltenham's offer for visitors.						
Outcome	**Action**	**Measure/target**	**Baseline (data)**	**Timeframe**	**Lead/support**	**Est. cost/source**
An analysis of the cultural and major events, packages and itineraries offer provides insight through a gap analysis for year-round product development opportunities.	**Commission detailed gap analysis of cultural & major events to identify market opportunities, partnership-wide resources and support year round programme development.**	Comprehensive mapping of current offer; specific ideas and opportunities identified for development.	Basic mapping as starting point (The Cheltenham Trust).	Apr-Jun 2016	Council, Place & Economic Development; Tourism Task Force	£3k if sourced Report should cost options where possible.

The tourist information centre (TIC) function at The Wilson and online is developed.	**Redesign the TIC into a true TIC – physical provision and presentation on site (signage, layout, fixtures/fittings), with appropriate updating online, through staff training etc.**	Completion to brief, time and budget.	Usage levels (online, on site), visitor experience ratings	Apr-Jun 2016 planning Jul-Sep 2016 commissioning Oct-Dec 2016 upgrade	The Cheltenham Trust; Council, Place & Economic Development	£5-8k redesign & build Training tbc subject to sourcing
There is a positioning for Cheltenham that both complements the Cotswolds offer and stands alone for the town as a day visit and short-break destination.	**Commission new content to articulate the (cultural) tourism narrative. This would create new, useable assets – a clear positioning, core messages for partners to adopt.**	Launch and adoption of brand assets by partners, media, region.	N/a	Jun-Sep 2016	Council, Place & Economic Development; Tourism Task Force	£3-4k narrative
Target markets are researched, informing product packaging development.	Working with Cotswolds DMO, build more market intelligence digest on target markets to inform planning and campaigns.	Research digests for all existing and emerging/new markets.	Not yet in existence	Jun-Sep 2016	Council, Place & Economic Development; Tourism Task Force	If not in-house, research commission £3-6k
There is more regular branded stakeholder (B2B) communications to the wider travel trade market, carrying news of tourism development and the evolving Cheltenham offer.	Schedule e-communications, generating news and promotional content.	Travel trade sector engagement levels.	See Cotswolds DMO	From Jun 2016	Council, Place & Economic Development; Tourism Task Force	£1k mail/database management
The brand positioning is	Explore options for culture &	Visitor experience	Not yet in	Sep-Dec 2016	Council, Place &	N/a

applied to an updated visitor welcome online, offline and across town and its channels to market, working with partners to develop understanding, skills & messaging.	tourism concierge programme/ training to uprate visitor welcome across attractions, hospitality, guides etc.	and propensity or return visit and/or recommend rating (benchmark survey).	existence.		Economic Development; Tourism Task Force	(Guideline £5-8k training, £2-4k annual maintenance)
There are key itineraries published and promoted that target priority market segments, as part of a tourism content strategy.	**Commission a short series of visitor itineraries (connecting the town's visitor offer, including with the wider region), to form the foundations for travel trade communications and consumer-facing packages.**	Number of itinerary products launched, downloaded/ distributed.	Not yet in existence.	Oct-Dec 2016 first batch	Tourism Task Force; The Cheltenham Trust	£2-3k itineraries

Market development						
Grow the visitor economy through targeted marketing communications programmes & systems.						
Outcome	**Action**	**Measure/target**	**Baseline (data)**	**Timeframe**	**Lead/support**	**Est. cost/source**
The digital infrastructure is designed and built to effectively manage sector communications across all platforms.	**Commission digital infrastructure development, notably for visitcheltenham website including basic CRM (database, analytics and e-communications).**	Online traffic, engagement and bookings; Data capture volume, Market data; Sales conversion and cross-selling; SEO;	Not yet in existence	Apr-Jun 2016 commission Jul-Sep 2016 delivery	Tourism Task Force; The Cheltenham Trust; Cotswold DMO	£12-15k website (subject to scope) £2-4k CRM (subject to software needs)

	Commission updating of the audio-visual assets for the town. **Schedule review to consider further digital audits**	Keyphrase search; Connections to core sites; Visit duration; User generated content volume.				£3k new image bank content £3k new video content commission
There is a strategic approach to data capture and management, from research to campaign, connecting regional, national and international advocacy, media and stakeholder channels.	**Commission evaluation and research framework (to dovetail with Cotswolds DMO developments) to create benchmark/baseline data.** **Review need for digital communications role after 12 months** (linking to previous secondary outcome)	Benchmark survey data established; Data capture volume; Partner engagement and joint promotional opportunities; Media coverage; User generated content volume; Success rate in funding bids.	Not yet in existence.	Apr-Jun 2016 framework Jul-Sep 2016 research	Tourism Task Force; The Cheltenham Trust; Cotswold DMO	£3-5k for research framework; £10-15k initial research (annual roll-out with lower costs)
Cheltenham targets national and international tourism and specialist media to profile the town's offer.	Develop and cost a brief for PR campaign(s), either through partner DMO or independent agency. Create basic media monitoring function.	Equivalent advertising value (EAV) in target media publications.	Not yet in existence	From Sep 2016	Tourism Task Force; The Cheltenham Trust; Cotswold DMO	In-house/£6-10k campaign; £0.5-1k pa monitoring
A shared calendar of major events, exhibitions, and activities is in use and up-to-	Create market-ready programme calendar and clash diary planning function.	Event/promotional clashes; cross-promotions and	Not yet in existence.	From Sep 2016	Tourism Task Force; The Cheltenham Trust;	N/a

date.		packages.			Cotswold DMO	
There is a simple framework for reporting and sharing market and research data, campaign evaluation data, online metrics, idea generation and planning.	Create template for data sharing and reporting within Tourism Task Force, at least quarterly.	Reports, digests in circulation and use.	Not yet in existence.	From Sep 2016	Tourism Task Force	N/a

This action plan is necessarily focused on the first 12-15 months of activity, and the outcomes and lessons from this period will inform an updated 2017-18 action plan and so on. A number of areas require further exploration, secured funding and an iterative approach to planning and development.

Addendum

A. CASE STUDIES

Bristol & Bath

– a tale of two cities working together to grow their markets

Illuminate Bath, Pulteney Weir, Bath Festivals

- Two very distinctive destinations working together for the first time in relation to cultural tourism – understanding the vital role of culture for place-making.
- One is known for heritage tourism, the other for culture, but Bristol was still not maximising its cultural tourism potential for weekend breaks, and Bath's tourists were missing out on a wider cultural offer, especially outside the main season.
- There was a lack of coordinated working, so cross-city networks and partnerships were set up, and working groups with a central coordinator (supported by Arts Council England Cultural Destinations funding). At the heart of this is two destination management organisations working closely together for the first time in many years.
- They have reassessed what their key messages are, as they were not telling their unique stories as well as they could be – e.g. Bath was dominated by Roman history and Jane Austen, but has more to offer including a more contemporary cultural offer; and Bristol is more than Banksy, Aardman and maritime heritage.
- New research revealed that visitors were not aware how close the two destinations are to each other and how easy it is to travel by rail between the two.
- Working together, they have been able to create complementary not competitive offers, adding value to each other's offers and packages.

- They are focusing on becoming more joined up across: cultural programming; visitor welcome and information provision (joint training programmes, volunteer management); approach to target markets, e.g. China; marketing campaigns; partnerships between the cultural and tourism sectors, e.g. transport providers.
- They are up-skilling re: digital communications and systems, including optimising websites, social media, ticketing from tracking to conversion, online campaigns.
- Together, they have been leveraging additional investment, e.g. LEP, to create a dynamic media bank (images, audio, video footage shared across the cities).
- They are testing out joint initiatives, e.g. Bristol & Bath Art Weekender, through building on the strengths of the existing offer (Bristol Art Weekender previously existed) and developing new product.
- A new, shared focus is highlighting opportunities and creating targeted campaigns to support, e.g. Bristol 800 (which includes events with real pulling power for tourists).
- They recognised a gap in market insight, and are investing in research and evaluation to create benchmark/baseline data and put in place a tailored cultural tourism research and evaluation framework to inform long-term planning and delivery.
- The two cities are working together to target national advocates, e.g. VisitEngland, Visit Britain, Arts Council England, local authorities, LEP.
- Planning now extends beyond the immediate funding cycle, as they have accepted the longer-term benefits of collaborative working as a fundamental pillar to their tourism activity.

Chester

– a city striving to keep ahead of newcomers

Chester is increasingly using its public realm to present experiential programming.

- Chester has a rich culture and heritage – a walled city, Roman heritage, mediaeval galleries, one of the world's oldest racecourses, a major Cathedral, early industrial architecture, the country's largest zoo, and the River Dee and Shropshire Union Canal running through the heart of the city. It is compact and walkable, and within reach of Manchester, Liverpool and Snowdonia National Park.
- Chester was a tourism jewel for the North West – an accolade however, that the city, around 10 years ago, recognised was increasingly beyond its use-by-date. Manchester and Liverpool are now competitors as much as markets.
- Chester was under-utilising and neglecting the very assets it needed to protect to hold position in a changing and evolving marketplace. It was taking its heritage assets for granted, recognising their intrinsic place-making value but not doing enough to make them relevant or to match modern visitor expectations.
- The net result was ultimately a disappointing experience for residents and visitors and a drop-off in economic impact and wider inward investment.
- The city partners came together under a collective One City Plan, which set out a framework to celebrate the city's strengths and shape the type of city Chester aspired to become through determined growth and focused action.
- The single strategic plan recognised that many partners have a role to play in Chester's evolution and implementation, and it supplied the clear leadership needed to coordinate both the public and private sectors so that Chester could regain a sense of purpose and a strong identity.
- Culture, heritage and tourism have played a central role in the vision. When considered together, they would provide a historically distinctive but ultimately contemporary offer and place-narrative. A cultural masterplan and heritage asset review for Chester is now in progress – with major capital investments planned alongside a review of how cultural heritage assets are used for the social and economic life of the city.
- Chester provides unique settings for events that show off the strengths of the city. An annual outdoor theatre and music programmed – Chester Presents – has demonstrated levels of demand to justify

additional investment. A new cultural centre is in development and the cultural experience is beginning to extend to its streets, squares and open spaces.

- The One City Plan supports the strategy for public art and an increasingly established programmed of regular events and festivals are helping animate the public realm and create bustling, lively and diverse spaces in amongst the city's shopping, civic and historic destinations during the day and into the evening to grow the nighttime economy and encourage longer dwell-time. These are being coordinated through a new Events and Festivals Board.
- The Chester approach is ambitious and focused, with a real interest in ensuring the cultural heritage assets are fully harnessed to create a liveable, visitable modern city.
- In 2007 tourism was bringing in 8.4 million visitors to Chester, who spent approximately £500 million in the city.
- In 2014 Marketing Cheshire announced at the Annual Visitor Economy Conference that the city has since then seen an average increase in visitor numbers of seven per cent year-on-year, and overall 23% since 2009. In 2014, 31 million people visited Chester with spending among tourists said to have increased to £1.6 bn.

York

– waking up to a new competitive landscape

York seeks to bring its diverse offer together through quirky campaigns.

- In the 1990s, York recognised that its public and private sector assets and organisations could work much more effectively together in light of increasing short-break competition from emerging tourism city destinations including Newcastle, Leeds and Manchester.
- Their solution was to create a multi-agency partnership approach – the First Stop York strategy – that included the City Council, Tourism Bureau, county tourist board, Chamber of Commerce, hospitality associations and attractions group amongst others.
- The aims were focused on maximising the economic and employment advantages of tourism in York to the benefit of businesses, employees, residents and visitors. Due to a lack of market insight alongside the

partnership model, four programmed strands emerged from strategic discussions:

- *Understanding the customer* – commissioning visitor and potential visitor interviews to establish the characteristics and attitudes of visitors, to inform partners with their targeting and marketing.
- *The quality of what York offers* – a comprehensive audit of year round events, identifying gaps and suggesting creative development, which led to new events including a Viking Festival, and a Food & Drink Festival, and encouraged new nighttime economy initiatives, IT improvements for booking systems, a visitor management action plan, better tourist signage, trails and visitor information patrols. A series of training courses were identified to improve visitor services
- *Customer-focused Marketing* – new research informed UK target markets focused on London/South East (pre-family adults) and over 55s from Scotland. International priority markets became the USA, Norway, Ireland. A PR campaign was developed and campaigns with rail providers were also developed (which boosted rail visits by 56%). The business market (MICE) was refreshed.
- *Strengthening the Partnership* – project groups took forward elements of the First Stop York strategy, enabling wider and deeper participation by local businesses. Funding sources were broadened due to the breadth of the partnership, and residents were involved via a Residents First Weekend and a mutually beneficial resident/visitor calendar of events.

– Growth was gradual, but tourism-generated revenue between 1997-2002 was estimated to have risen by approx. 20% (£244.4m to £292.9m) with hotels seeing the biggest benefit.

– The recent floods will of course require a fresh focus, but the latest tourism guide very clearly positions York through its cultural offer first, then in relation to its heritage and sport offer, and focusing on the breadth of city based festivals (see below for a link to York's 2016 visitor guide).

– http://issuu.com/visityork/docs/visit_york_destination_guide_2016?mc_cid=6a8af1f7fd&mc_eid=dcd8182039.

Norwich

– using culture to reposition its image

Robert Wilson's Walking, part of Norfolk and Norwich Festival.

- Has a 'good to go' year round cultural offer, which it now articulates (not just its signature events) with particular breadth and depth in the performing arts: music, literature, theatre (most successful commercial theatre outside London), outdoor performance, and growing visual arts offer. This summer Norwich hosts the British Art Show 8, as one of four selected UK cities hosting this major visual arts event.
- Norfolk and Norwich Festival acts as a flagship event but is supported by a mix of small to mid-scale festivals across art forms (e.g. performing arts, visual arts, literature, heritage, film) across the calendar.
- They have a particular strength in Writing and Literature, drawing on its heritage (Julian of Norwich, 12th Century), an internationally recognised writing course at University of East Anglia, the New Writers' Centre (currently going through a major capital development for a purpose built centre), a Literature Festival, and UNESCO City of Literature status.
- The strong and distinctive built heritage adds to sense of place with an attractive mediaeval core at the heart of a walkable city.
- A major international heritage programmed has evolved, with partner city Ghent and supported by European funding, to develop new ways of working to promote the 'Norwich 12' (major heritage buildings) and international collaborations. Increasingly opening up these heritage sites for creative use by cultural events and festivals, independent promoters, local food and drink providers and this has transformed their visitor/user base.
- Independent boutique retail in the Lanes is supported by all major high street brands nearby. A growing independent food and drink offer is creating further distinctiveness and profile for local produce and delicacies.
- Analysis revealed a lack of good quality accommodation in the city centre, so now new boutique hotels and B&Bs are being developed.
- Norwich suffered from misconceptions around image, primarily associated with the success of Steve Coogan's Alan Partridge fictional character, but took a proactive approach and even hosted a premiere of the feature film *Alan Partridge: Alpha Papa* (2013).
- They seek out and work with high profile ambassadors with local connections, e.g. Stephen Fry, Delia Smith, to support major bids such as UNESCO City of Literature.

- Though the city was unsuccessful in bidding to host the first UK City of Culture, it used the process to galvanise new partnerships and ways of working (locally and regionally), resulting in a successful bid to become UNESCO City of Literature which has in turn contributed towards the development of the New Writers' Centre capital project.
- It can be difficult to access Norwich from outside the county due to limited road and rail connections, but it does have an international airport and rail links to London are improving, with new additional investment to rail networks announced recently.
- A visitor welcome training initiative was set up and delivered targeting front of house, visitor services staff and taxi drivers resulting in more informed advocates for the city's offer.
- Norwich is part of the Norfolk and Suffolk cultural tourism initiative that received Arts Council England and New Anglia LEP funding following work completed by Creative Tourist to help them to make the case for investment to partners.

Festival No.6, Portmeirion
– animating events for place-making

Performance in the Central Piazza, the hub of the festival.

- The location at Portmeirion is used as a source of inspiration not a backdrop, from the architecture and vision of Sir Clough William Ellis to the arts and cultural history of the village. This led to arts and culture being central to Festival No.6 alongside the more expected music programmed. The audience responded.
- With over 10,000 very active festival goers over four days, over 1,000 staff and performers deliver the event. It now attracts a pan-regional audience (Wales, North West, West Midlands), but also significant numbers nationally, not least from the London media. Critical reviews are a major part of the marketing communications strategy, building on digital/social platforms from festivalgoers.
- The festival books up a host of accommodation in the surrounding area including independent hotels.
- Festival goers then book up most (if not all) local B&Bs and hotels in a

30-minute radius.

- Taxi companies, restaurants, cafes and local shops are engaged, and do see a huge rise in business that week.
- The feedback they have received from residents shows that the area is grateful that the festival has brought international talent and the festival experience to their doorstep, and also thankful for putting the area in the spotlight and introducing thousands of new people to the delights of Portmeirion and the surrounding area.
- Festival No.6 endeavours to use local suppliers as they have extensive local knowledge, it reduces transport costs, has less of an environmental impact and of course benefits the local area.
- Festival No.6 has clearly defined itself as a major fixture of the UK festival season and carved out a niche in a crowded market. The location of Portmeirion is a huge initial attraction, but it is the way the festival makes the village come alive as a series of unique venues for one-off performances and collaborations, which makes it unique. It makes festival goers feel like they have escaped to a fantasy wonderland for the weekend, leaving the drudgery of modern life behind.
- They have developed very clear key messages through their brand positioning – a festival like no other in a place like no other – which is backed up by the visitor experience, right down to the use of language, which is open, confident and fun (they offer a bespoke banquet rather than a wide variety of events for example).
- Festival No.6 does not need to create secondary festivals to carry new messages or product. Instead it builds on the brand and recognises that people like more than one thing. So the current festival mixes music genres with arts, families & kids, food & drink, theatre & spectacles, talks, cinema, comedy, processions, parties, literature, walks, spa, nature, outdoor sports & leisure…
- "*Festival No.6 imbues the village with Clough's spirit and brings the place to life in a way no other event could ever achieve. Clough would give you five stars, and so do we*." Robin Llewellyn, MD of Portmeirion, grandson of Sir Clough William Ellis.

Nantes

– culture & creativity reinvigorates an urban centre

Nantes returns to the sea for inspiration in its marketing.

- Once a declining city, Nantes has successfully used culture as means of dramatically and playfully reinvigorating itself with both residents and tourists.
- From the main dock closure in 1987 an extraordinary city regeneration began – to develop Nantes as a creative centre, and use that creativity in the city's branding. Over the last 20 years, Nantes has turned itself around to become one of France's top 3 cities for economic growth and demographic development. Its 300,000 inhabitants are estimated to grow 100,000 by 2030 and with 2 out of 3 inhabitants under 40 years old, Nantes is one of the youngest urban areas in France and a leading economic area in Western France, supporting 25,000 companies and 275,000 jobs.
- Creative and cultural industries, have played a major part in this revitalisation, with the city partners committed to what it delivers to quality of life and social cohesion as well as tourism. In 2006 Nantes was acknowledged as having the best quality of life in France.
- Les Machines de l'Ile – a giant, mobile fairground and creative workshop – has transformed 337-hectares at Ile de Nantes. These huge iron, concrete and steel warehouses build on Nantes heritage through Jules Verne's stories and the city's technological and engineering past, and is now a year round visitor attraction, adapted across the seasons (ice shows in winter for example).
- In early 2010, the project moved into its current phase. The decision to merge the Nantes Tourist Office with the cultural department created a new initiative dedicated to developing tourism in the Nantes conurbation: Le Voyage a Nantes – The Journey To Nantes.
- Le Voyage a Nantes is a new way of experiencing the city – a cultural walk or journey – that is both the marketing campaign and concept, as well an actual experience, bringing together the new offer with the city's heritage, in a coherent cultural tourism narrative for the city. At the same time, it looks beyond its immediate city boundaries via a large scale public art programme first launched in 2007 which links the town to the sea at St Nazaire 60km miles away, with boating, walking, cycling and accommodation packages.
- It hasn't set out to expressly engage high spending or fashionable visitors to Nantes – far from it, but it still aims to deliver the best cultural and visitor experiences that it can. 50,000 local residents

engage as active volunteers and in 2012 Nantes saw a 25% rise in visitors, welcoming 2m tourists who in turn generated €48m (€9.1m more than the previous year).

Southport
– reinventing the cultural image of a resort town

- Southport's tourism offer and how the town is developing is key to making a viable visitor destination and thereby generating economic growth and social benefits for the wider community.
- Southport, as one of England's historic coastal resorts, continues to attract millions of visitors each year. The town has managed to reverse its fortunes in recent years, re-inventing itself as a successful conference and golfing destination, allied with a major programme of popular and cultural events to extend the season and attract new visitor demographics. Visitor spending rose from £153m in 2000 to £254m in 2006 (STEAM data) and town conferences annually average circa 70,000 bed nights. Further boosts came on the back of significant private sector investment in conference, hotel accommodation and leisure facilities between 2007 and the present, including a new Cultural Quarter and a revitalised arts centre – The Atkinson.

- Southport's Investment Strategy described the town as "an attractive and vibrant town, with an emerging brand as England's Classic Resort". However, it went on to say that the tourism offer, whilst not in decline, was "at risk of losing the recent hard won momentum if it does not respond to predicted demographic changes".
- One of three highlighted key issues was to develop a recognised cultural tourism offer.
- Sefton (the local authority that includes Southport) hosts two international signature events – the annual Grand National and less often Open Championship Golf, and is home to the internationally famous *Another Place* by Anthony Gormley, the artist behind *The Angel of the North*. There are also a number of major event days in Southport that attract significant visitor numbers including the Southport Air Show (100,000+), Southport Flower Show (100,000+), Firework Display (45,000) and a range of other events that contribute to the calendar both during peak and out of peak season, such as the Southport International Jazz Festival and Southport Food & Drink Festival. They even have their own Weekender – a massive dance party!
- So the priority was agreed to develop a recognised cultural tourism offer comprising existing and new venues and signature events, which can be promoted as part of the regional cultural offer, and well packaged with accommodation and the wraparound offer. The brand characteristics for the town were articulated to include: 'Culture – a vibrant and sophisticated programme of cultural activity'. The result is a new Cultural Centre (The Atkinson on Lord Street), supported by events (within a 5-year strategy), consumer-focused promotional packages and campaign activity.
- The target markets were defined as "the increasingly aspirational and quality conscious citizens of Liverpool and Manchester, both to live and visit", as day visitors but also attracting a strong short break market.
- Independent studies made numerous recommendations between 2004-2009, many of which have been implemented in full:
    - Continue to improve the offer of the existing events, particularly the mid-size emerging events, to widen the appeal to cultural tourists.
    - Exploit the PR opportunities that come with events.
    - Develop and nurture a Cultural Industries Quarter in and around the waterfront.
    - Create a Cultural Quarter group tasked with developing a business plan that will establish how the quarter will be developed and managed (including securing tenants).
    - Develop an events strategy led by culture, leisure and tourism sector.
    - Identify the range and type of cultural activities and services to be attracted in to the quarter and undertake research to find 'on-brand' activities and attract artists, cultural entrepreneurs, restaurant owners and event organisers.
    - Create improved online content and channels. Increase e-

marketing within the promotional mix, focusing on social networking sites and travel sites and blogs. Marketing Liverpool (the designated destination management organisation) could be a key lead partner to help deliver the new digital strategy.

- Analyse consumer databases and ensure that the material being used to communicate with them is effective.
- Brand hierarchy for targeted markets across the clusters and key events, also supporting international brand campaign marketing.
- The marketing to new audiences should take place throughout the year to match their visit-taking patterns. Activity should include drip feed PR, events promotion and off peak special offers tied to activities.

Liverpool
– connecting a great city and a great horse race

La Princesse, Liverpool Capital of Culture 2008.

- The success of Liverpool as European Capital of Culture 2008 has been well documented and is referenced earlier in this report. There is a wealth of detailed research, evaluation, information and reports on the Impacts 08 website – www.impacts08.net. Liverpool understood the power of quality research and evaluation to demonstrate impact, measure success, inform future planning and leverage new investment.
- So it is interesting to examine how Liverpool is faring now, ten years on, looking at the legacy of that major programme, in particular the use of culture for place-making. In fact Liverpool is currently undertaking a large-scale research and evaluation programme to assess the impact of Liverpool Capital of Culture ten years on.

- There is no doubt that the repositioning of culture as a significant part of the city's destination offer has generated a sense of local civic pride, recognition within local government, a continued increase in domestic and overseas visitors to the city, particularly for weekend short breaks, as well as a change in external perceptions of Liverpool amongst the public and significantly the national media too. The City Council appointed Claire McColgen MBE as the new Director of Culture in 2009. Clare had developed and delivered the community engagement programme for Liverpool 08 since prior to the city securing the accolade as Capital of Culture.
- Liverpool has also benefitted from recent major new capital developments such as the Museum of Liverpool, Arena and Convention Centre, new viewing gallery at Aintree Racecourse, new Cruise Terminal, Liverpool One shopping centre, linking the city centre to Albert Dock and thereby redrawing the city's boundaries and easing navigation, in addition to the boom in new hotels, bars, office blocks and more.
- As an international port, the city has long held international relationships, e.g. America (emigration), Scandinavia, Far East (now via football), which it continues to build, particularly through cultural collaborations.
- The new focus on culture and tourism has enabled the city to continue to develop its major events strategy across culture, heritage, sport and business. Liverpool now has the ability to attract high profile artists and companies to produce new work and showcase work not previously seen outside London. Prior to 2008, the city was probably best known for its role in the explosion of popular culture of the 1960s through The Beatles and MerseyBeat, new writing in theatre and poetry from the 1960s onwards, and Liverpool Football Club. In more recent years the city has developed an impressive reputation for contemporary visual arts, particularly through the work of Liverpool Biennial and Tate Liverpool. Now perceptions of the cultural offer are more rounded and the city's ambitions continue to build resulting in some major new cultural collaborations, such as internationally renowned Royal de Luxe through to new events including Liverpool International Music Festival.
- In 2012, Liverpool's major cultural events generated £73m for the local economy, as reported in Destination UK, Issue 50. The city council commissioned a report to investigate the impact of five major events – Sea Odyssey, the Olympic Torch Relay, Music on the Waterfront, Mathew Street Music Festival and the Irish Sea Tall Ships Regatta. The free outdoor event Sea Odyssey (Royal de Luxe) attracted 800,000 visitors spending more than £46m, 'making it the most successful event ever held in the city'. Mayor of Liverpool Joe Anderson stated: "It's important never to underestimate the value of cultural events, not only do they bring in huge economic benefits, but this year's programmed has supported nearly 1,500 jobs which, in this current climate, is extremely valuable".
- Two of Liverpool's development agencies worked jointly on a bid to attract European funding worth £2m for Place Marketing activity. "The

agreement between the city council's Liverpool Vision organisation and the Liverpool City Region Local Enterprise Partnership (LEP) will mean that the newly established, Marketing Liverpool, will take the lead on promoting the city region", as reported on the Prolific North website, January 2013.

– Aintree Liverpool, home of The Grand National, worked with marketing and PR agencies to target the female market when they recognised a major gap in their market. Though most major horseracing events/festivals include a Ladies Day, it is often no more than a badging exercise with no additional activities. Aintree developed a bespoke Ladies Day event with a campaign specifically targeting a local/regional catchment area but with the potential to generate national media coverage. The event has developed over the last few years so that it is much more than merely a local fashion parade but includes female celebrity and female jockey ambassadors, an after show party hosted by a well-known female BBC DJ, a Grand Women's Summit Panel focusing on improving gender balance in horseracing and sport, and live music. This has provided an extra focus for local partners, especially retailers to get involved in the Grand National festival and to create more links between the racecourse and the city centre, thereby increasing the profile of both the event and importantly the numbers of visitors to Aintree, from the city as well as from across the region, the UK and internationally.

– www.thecrabbiesgrandnational.co.uk/fabulousfriday/?_ga=1.198949167.1833445893.1452160170

B. STUDY PROCESS SUMMARY

To deliver on this ambition of the brief a four-stage process was undertaken:

1. Audit – situational analysis
2. Analysis – towards an interim findings report
3. Draft – full working draft
4. Finalise – integrated final report (audit, outcomes proposition, action plan)

Stage 1: Audit

This incorporated a top line feasibility analysis to assess options against a number of key indicators to assess their potential to deliver, as well as their viability and sustainability. This audit stage, through desk analysis, and workshop and consultation activity, critically assessed each option across a number of key areas.

Request for Information

Following inception, a written Request for Information (RFI) was prepared. This questionnaire helped to frame the scope of work and, in particular, to identify the assets available to support engagement with (cultural) tourism audiences. The RFI also requested full access to relevant audience research outputs and reporting platforms (e.g. Google Analytics).

Research and insight review

Desk research across all areas of the feasibility provided a solid context for the recommendations and outline delivery plan. This was built on with consultation with key local and regional stakeholders to provide an up-to-date and informed view of the region's tourism offer in 2015 and looking ahead.

The process of mining the existing data to reveal insights is a standard practice. Why? Because most commissioned research already touches upon the subject, whether coming from cultural or tourism sector origins.

Sense checking and creative testing of options

A review of the thinking to date to ask: what is this option/route intended to achieve for the tourist market?

Stage 2: Analysis

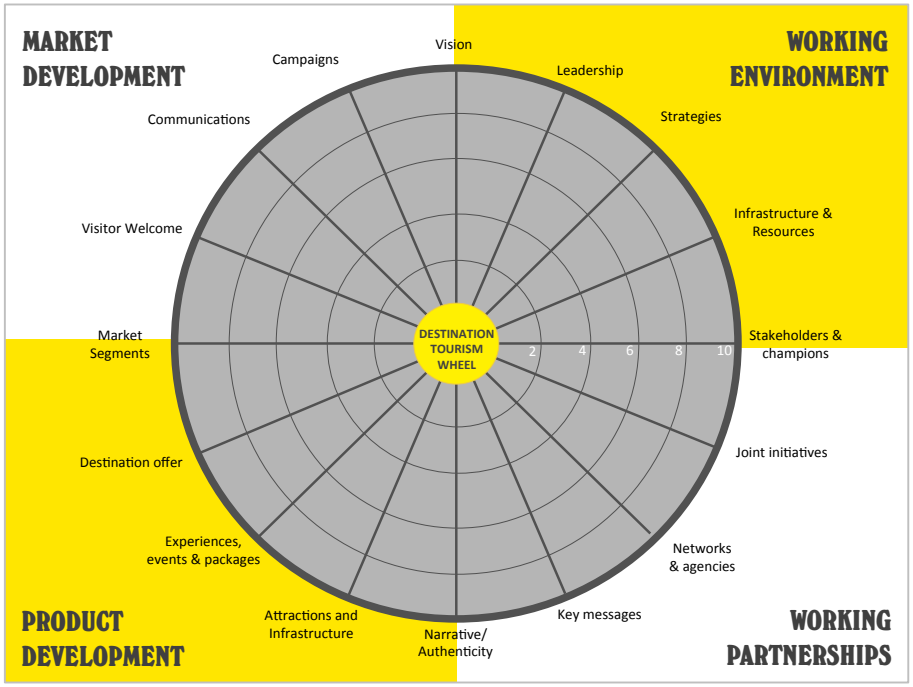
This study required more than market analysis to deliver useful development options – a holistic and strategic view of everything that could impact and contribute to effective and sustainable (cultural) tourism activity. To bring coherence to the analysis CTC's distinctive 360° approach was applied.

A 360° perspective

It has four main categories:

5. *Working Environment* – It all starts with a vision, and the strategic infrastructure to drive that vision forward.
6. *Working Partnerships* – The networks, consortia and shared objectives that will drive progress across a destination.
7. *Product Development* – A strong and diverse offer is the starting point, but it is the whole experience that counts.
8. *Market Development* – Deliberately the last section, reflecting the strategic development across Cheltenham's partners that is required to support marketing, packaging and campaigns.

The *Destination Tourism Wheel* allowed presentation of a clear profile of the critical building blocks: where you are now, then overlaying where you want to be, say, in five years' time.



Destination Tourism Wheel, © Creative Tourist Limited

Mapping the cultural tourism offer

To maintain stakeholder engagement but also to encourage creative analysis, facilitated workshops were held to test and deconstruct the options and potential recommendations. This was supported by the targeted 1:1 consultations.

Central to the programme of work was the market (demand) analysis. It was used to test current attitudes towards Cheltenham based on the data available, and measure the fit between the values and attributes of the Cheltenham offer, and the stakeholders' ambitions and vision for the town and sub-region.

Comparator analysis

This included comparable destinations – useful lessons in market development, product and programming development, partnership and infrastructure models will come from a variety of sources.

Digital capabilities and gap analysis

Key capabilities were identified and the available assets analysed to determine whether they were fit for purpose. Recognising the central role of digital channels in engaging tourists, analysis of technical assets such as websites, web content, e-commerce platforms, and measurement and reporting infrastructure was a particular focus during this stage. We employed the 'R.A.I.S.E.' engagement framework to analyse how Cheltenham's assets are positioned to:

- Reach target tourist markets through channels such as email, search engines, social networks, online PR, partner marketing and display advertising.
- Attract those audiences to websites, physical venues and other assets, while enabling reliable attribution of visitors to media and campaigns.
- Involve visitors in journeys of discovery through content toward designated 'product' pages (e.g. event listings or venue information pages).
- Satisfy visitors' need for cultural participation and enrichment by converting them through transaction (i.e. purchase, booking or enquiry) goals.
- Extend engagement with individuals by promoting subscription and retention. Extend engagement to wider audiences by encouraging visitors to share Cheltenham content and experiences through on- and off-line social networks.

A key consideration throughout this analysis was whether relevant assets were capable of reliably measuring visitor engagement across major touch-points, of reporting outcomes against key performance indicators (KPIs), and of supporting ongoing optimisation.

At the end of this stage an interim report was produced, with a summary of findings.

Stage 3: Draft

Perhaps the most critical milestone of the project – where earlier consultations and insight generation are tested, presenting potential routes based on approved assessment criteria to examine their viability. This was tested through a series of round-table interrogations with key stakeholder groups that used the interim report as a baseline and informed the full working draft.

Stage 4: Finalise

The final report applied a full-depth and evidence-based analysis of each of the remaining/emerging options, produced more detailed figures to support the outcomes proposition, required investment and recommended timeline for development.

Creating a route map action plan

This provided ordered outputs and outcomes with budget estimates, who leads this activity, and timeframes, taking forward the vision, objectives and recommendations of the main body of the plan.

C. MARKET INSIGHTS AND THE EVIDENCE BASE

Target markets

This aligns fully with the target markets of the wider Cotswolds offer, but clearly still targets segments that seek out the visitor experiences that Cheltenham specifically can and does offer. This reflects data-driven domestic market analysis.

Segment	Detail
Traditionals	Strong orientation towards traditional values. Value individual attention and service. Self-reliant. Slow to adopt new options. Physical sports and lively nightlife don't appeal.
Cosmopolitans	Strong, active, confident, and high spenders. Style/brand important, but as an expression of their self-made identity. Looking for new challenges, new experiences, globetrotters. They favour urban destinations as well as scenic locations, and take, on average four short breaks pa. They are most likely to holiday in England.
Functionals	Self-reliant. Price driven. Value function over style. Traditional values, but interested in new experiences, not risk averse.
Discoverers	Independent of mind and are the least likely to worry about what others might think. They live a fairly relaxed pace of life – 42% have children at home. A further 25% are post family. One of the highest rates of taking holidays as well as one of the most active groups for taking UK holidays, including coach parties.

Business tourism is important to Cheltenham, and major local employers (especially GCHQ) provide year round business to the accommodation, food & drink and retail sectors. Whatever longer-term plans the local area may see – whether in the town centre, Racecourse (who have the Centaur conference centre) or elsewhere – a new major conference centre is unlikely to be one of them. Cheltenham suits the MICE (Meetings, Incentives, Conferences, Exhibitions) market very well with its existing provision, both in the town and on the rural edges. This market is looking for quality, and often something different. Cheltenham has the venues to serve this market without need for major capital development. There is considerable competition for the business tourism market nearby, particularly in Bristol, Cardiff and Birmingham. Cheltenham cannot compete with those destinations for major conferences, not just because it lacks a major conference centre, but also because it does not have the accommodation capacity in comparison. Cheltenham's business tourism

offer needs to be articulated and promoted as an alternative MICE offer, utilising a range of potential venues and accommodation partners, in a place that offers a distinctive semi-rural location.

Whilst the domestic market is the primary market, international markets can also build on the targeting developed for Cotswolds, which includes the Cheltenham offer. The key drivers for these markets remain ease of access, quality and distinctiveness of experience and the ready availability of information and support in planning (pre) and execution (during) the trip, e.g. Visit Britain, VisitEngland, Visit Cotswolds and Visit Cheltenham as the official channels.

Segment	Detail	Messages
USA	East Coast FIT ('Free Independent Travellers')	Quirky, food and accommodation led
North/Near Europe	Touring and FIT	Quirky, food and accommodation led, Outdoors
China	Microgroups	Romance and location/rural experience, English, Shopping
Australia	FIT, 50+	Quirky, English, sporty
Japan	Female 18-35, retired, FIT	Traditional images and accommodation. Can respond to 'Arts & Crafts' movement with Cheltenham
Others		Sensible levels of low/no cost support are given to other press enquiries, e.g. Brazil, Korea etc.

Generating insight

Integral to any proposal to develop cultural tourism is a need to understand existing markets and market potential and to establish mechanisms that ensure that the outcomes and impacts of activities can be identified and measured. Consequently, the gaps in market knowledge identified earlier in the report need urgently addressing to help Cheltenham's Tourism Task Force provide a collective response to support the effective delivery of a bold, new strategy deploying targeted use of available resources.

Like many destinations, current research and evaluation practice is, at best; primarily focused on assessing only the immediate economic impacts of cultural events and festivals. This is not an issue exclusive to Cheltenham. Despite a growing need, the research conducted in the UK to date is generally weak in its understanding of existing cultural tourist markets and market potential. The opportunity exists in Cheltenham, however, to adopt a comprehensive approach that will measure the longer

term, economic, social and cultural impacts of cultural tourism activities, as part of a holistic place-making approach.

A research framework is required that adds value beyond monitoring, helping to inform cultural tourism priorities and strategic direction. The framework design and year one delivery would benefit from the involvement of a specialist research consultant or partner. Their brief should be to establish a practical research framework that will fill knowledge gaps and also measure progress against stated and measureable objectives.

It will require them to build a collaborative approach to data collection, access and analysis and the initial priority will be to assess the scope and scale of the partnership. Ideally the framework should inform a rich understanding of the Cheltenham tourism market in the overall context of the Cotswolds and Gloucester, and providing insight about the unique characteristics, propensities, preferences, perceptions and reactions of individual market segments, and in particular cultural tourists.

The framework will be informed by the existing audit and review of current audience and visitor research practice and data sources (Addendum C/D) and, ahead of it becoming embedded as core practice and rolled out year on year, will include the following catalyst activities in year one:

- Consultation with partner organisations to establish common research objectives and questions;
- Mapping all partners' existing sectoral reporting and monitoring commitments such as STEAM, ArkLeisure, Audience Finder, T-stats;[12]
- Establishing and coordinating a series of relevant and achievable cluster benchmarks, such as gathering hotel occupancy figures to benchmark seasonal and annual variations, cultural venue box office data and door counts, retail performance, website-hits and wider digital conversion goals;
- Development and piloting a range of template research instruments;
- Investing in additional reporting such as market segmentation and geo-demographic profiling, drawing on postcodes of tourism visitors and cultural attenders; mapping and tracking the behaviours and booking patterns of staying visitors and the activities that they undertake;
- Analysing, interpreting and reporting on the research findings to inform strategic developments;
- Adjusting and/or refining the research and evaluation framework in the light of the findings and setting a forward plan. This should include formative evaluation (any evaluation that takes place before or during an event/action) for product development, e.g. assessing appropriateness of targeting, messaging, use of budget, likely Return On Investment (ROI) etc.

[12] All forms of different data collection and analysis market research tools.

Each of the above activities needs to take place in the next phase to provide a sound foundation. Costs would increase if the partnership work extends to include Cotswolds and Gloucester, although that would deliver additional resources and possibly economies of scale.

Generating digital insight

The research consultant or partner will need to liaise closely with the digital marketing coordinator to draw in to the picture the findings of the digital tracking and performance monitoring, specifically the following items:

- Design and development of a shared, single platform (Google Analytics) to **measure** audience engagement all the way from impressions on external channels to sessions on partner websites, then through transaction, subscription, and shared goals;
- Creation of **private reports** in Google Analytics that allow key partner decision makers and team members to monitor the performance of their digital campaigns, content, and other assets in terms of return-on-investment (ROI);
- Create **shared reports** (using off-the-shelf, affordable platforms such as Analytics Canvas (www.analyticscanvas.com) that allow partners to benchmark their performance anonymously against other partners in terms of standard key performance indicators (KPIs);
- Develop and implement **conversion rate optimisation** (CRO) methodologies that combine experimental design of campaigns, content, and creative with precise measurement and timely reporting through Google Analytics, supporting the development of actionable insights;
- As it moves to the next stage of strategic development, a series of specialist audits or analyses will also be required:
  - An **SEO Code Audit** to identify opportunities for enhancing the technical accessibility of Tourism Partnership Group (TPG) websites to search engines (provides the basis for an SEO code optimisation plan);
  - An **SEO Content Audit** to identify relevant and opportune keywords for home, section, category, and content pages on partner websites (provides the basis for on-page content optimisation by trained team members);
  - A **Link Audit** to reveal the sources of links to all partner websites and identify broken links (provides the basis for link recovery and relationship building efforts);
  - A **Social Media Audit** to provide insights around the volume of unique and non-spam subscribers, as well as cross-subscription between partner accounts (informs planning and optimisation of social media marketing activity);
  - An **Email Audit** of newsletters and other assets, as well as campaign-level data including bounce, open, and click-

through rates (informs planning and optimisation of email communications);

- Deep analysis of **seasonal** trends in audience engagement across partner assets, including off-line (informs timing and geo-targeting of engagement activity, especially cross-promotions);

Analysis of **mobile** user engagement with existing assets and of mobile website usability (informs planning of mobile user engagement – where mobile is by far the most significant source of traffic growth to partner websites).

D. DIGITAL ASSETS & CAPABILITIES MAPPING (SUMMARY)

This is a separate technical report and full details are confidentially available to the individual contributors. This reports findings from the audit of digital assets and capabilities belongs to select member organisations of the Cheltenham Tourism Partnership Group.

It identifies opportunities for those organisations and for the region to raise engagement with cultural and tourism audiences.

During October 2015, Creative Tourist Consults (CTC) conducted a survey of digital assets – including websites, promotions, and engagement data – belonging to member organisations of the Cheltenham Tourism Partnership Group. The purpose of this survey was to determine what capabilities these assets might bring to Cheltenham's future digital strategy for cultural tourism, to identify any capability gaps, and to develop a mix of actions and recommendations that would help Cheltenham to engage cultural tourists online.

The overall picture we gained was one of imbalance between partners and offers, and of uncertainty about the future direction of Cheltenham's future digital strategy:

- **Cheltenham Festivals** dominates the cultural space, with its strong brands and network of powerful influencers giving it ready access to a national online audience. But how can local venues stand out against this background, how might they benefit from it, and what can they, in turn, offer the Festivals?
- As another brand of national and international significance, the **Racecourse** is engaging a larger online audience than all other Cheltenham-based partners combined (excluding, that is, cotswolds.com). But it is not yet clear whether arts and culture will resonate with this racing-mad audience;
- With a visitor offer that relies so heavily on festivals and racing, demand is subject to extreme levels of **seasonal variation**. With capacity already stretched at peak times, Cheltenham should be looking to attract more visitors between the peaks. But is the year-round offer – or, at least, the part of Cheltenham's offer audiences can discover online – sufficiently distinctive and compelling?

- The Cheltenham partners are relying on **repeat visits and familiar audiences** for the vast majority of their online traffic, with nearly three-quarters of users arriving either directly on websites or after searching for place names and brands. However, reaching fresh audiences through new channels will likely present partners and their marketing teams with significant challenges. Are they committed to learning about and experimenting with new digital techniques and channels? Do they have the resources to compete online with more established cultural destinations?

We believe that the key to creating a more balanced online presence and to resolving these uncertainties will be for partners to work collaboratively, to share their (often unequal) resources, and to sacrifice some short-term interests for the benefit of the town as a whole over the longer term; indeed, to put into practice the very principles which first inspired the Tourism Partnership Group (TPG).

In the process of gathering data for this audit, however, we encountered an unusually high level of resistance from some partners to the idea of sharing audience engagement data.

While it is only natural and proper for organisations to value and protect their data, the occasionally unsympathetic response we received to our requests suggested that some partners may not yet be fully engaged with the principles of the TPG, nor ready for the degree of cooperation and compromise that a successful cultural tourism strategy will require.

From the data we were able to analyse, it was clear that some of the partners already possess some of the capabilities that Cheltenham will need to engage cultural tourists online. All partners, however, will need to address a range of capability gaps before Cheltenham can start competing effectively online with more established national or international destinations.

With brands such as cotswolds.com now taking positive steps to address weaknesses in their web presence, other partners should carefully examine how they are positioned online and consider additional investment in their digital assets and capabilities.

We have summarised below several of the more significant gaps and opportunities we identified when conducting this digital mapping exercise.

1. Content

Content is at the heart of every successful online strategy. It's why people come to your website and why other websites link to yours. It is what people share through social networks and how they discover you through Google or other search engines.

Most partners, however, are not publishing original editorial that speaks directly to the needs of arts and culture audiences outside Cheltenham.

Many of the event listings on partner websites, for instance, are being duplicated on other websites or even – in the case of touring productions

and exhibitions – in other destinations. It is not always clear, in this context, what Cheltenham offers cultural tourists that they might not experience elsewhere.

We have identified three main ways in which partners should be using editorial to engage cultural audiences online, while reinforcing the distinctiveness of Cheltenham's cultural offer:

- By publishing original **listings** for every activity, along with feature articles, blog posts, videos, and other items that build a sense of occasion and destination, even where the offer itself may not be unique. Consider how HOME in Manchester is using downloadable seasonal magazines and bi-monthly guides to put their distinctive stamp on activities, such as films, that are not exclusive to their venue;
- By partnering with one another and the TICs to create bespoke **itineraries** around seasonal activity such as festivals and major one-off events. These itineraries should include recommendations matched to the audience. For instance: Are jazz festival attendees likely to prefer boutique or budget hotels, fusion or fine dining? Where in Cheltenham might they want to shop? What exhibitions are on while they're in town? While partners could simply provide links to the TICs and relevant external websites, hosting itineraries alongside their own content should create a more joined up experience for users, while making it easier to measure impact in terms of online traffic or bookings;
- By publishing **guides** to specific periods (e.g. "What's on in January?") or to categories such as theatre, gigs, or art exhibitions that combine informed, up-to-date editorial with curated listings and visitor information. While content such as Visit Cheltenham's Entertainment page - which features a static run-down of the town's main theatres - represents a step in the right direction, none of the partners is yet providing comprehensive and credible guides to the town's cultural offer. These guides need not always involve high word counts: Visit Wales' monthly event guides and Visit London's top 10 guides demonstrate how these elements can be brought together to engage local audiences and visitors alike - while requiring little ongoing editorial or design resource.

2. Search engines

Non-paid (or 'organic') results on search engines such as Google are the single most important channel through which audiences discover new things to do and new places to go online.

Our analysis suggests that the lack of cultural editorial on partner websites is being compounded by weaknesses in 'search engine optimisation' (SEO), making it difficult for users on web search engines to discover Cheltenham's cultural offer.

This is not to say that partners are failing to attract users from search. Indeed, organic search results supplied nearly three quarters (72%) of all traffic to partner websites over the past year. Almost all (80%) of these users, however, were already searching for local places and brands (e.g. "cheltenham" or "cheltenham racecourse"), rather than for "concerts", "art exhibitions", or other types of cultural activity.

The partners need to find ways of reaching beyond established audiences - those who are already searching for "cheltenham" – to connect with the much larger audience of people who *may not yet have considered Cheltenham, but are in the market for the types of cultural activity it offers*.

Here, again, content is key - and the partners will need to combine informative and relevant editorial with best practices in search engine optimisation:

- First, to identify the precise words and phrases that real people in target markets are using to search for cultural activities and destinations; **keywords** like "theatre breaks" or "uk museum exhibitions";
- Then, to publish content on their websites that search engines will recognise as **relevant** to those search terms; consider, for instance, Visit London's portfolio of cultural category pages (e.g. Theatre Breaks and Museum Exhibitions), which are competing effectively for visibility in Google search results against sites such as www.toptheatrebreaks.co.uk or www.timeout.com;
- To ensure content is **accessible** to search engines (as well as to a wide range of human users) by deploying technologies such as structured data. Commercial sites such as www.skiddle.com are already leveraging these technologies to out-compete partners for visibility in Google when audiences search for terms like "gigs in cheltenham".

3. Relationships

Our opinions are influenced not only by those close to us, but also by the voices of relative strangers: academics, journalists, celebrities – even anonymous posters on review websites such as TripAdvisor. Once partners have relevant editorial in place on accessible websites,

relationships will play an indispensable role in making cultural Cheltenham more visible on search engines, social media, and the web.

We found significant scope for partners to 'amplify' messages about Cheltenham's cultural offer online by strengthening relationships with one another, with public sector stakeholders, and with other online influencers.

Effective online relationship building will require partners to adopt a coordinated approach:

- To take advantage of forums such as the TPG and further develop **partnership** marketing approaches; expanding cross-promotions between Cheltenham Town Hall and the Wilson to include other venues may be a good place to start;
- To identify authoritative websites (especially from .ac.uk or .gov.uk domains) that are already **linking** to partners and ask them to link to new web content; with links from nearly 3 times as many web domains as the next partner, the Festivals may provide a valuable 'relationship reservoir' for Cheltenham;
- To engage audiences on **social networks** and respond constructively to visitor feedback on platforms such as TripAdvisor; while some partners are already doing well here, all partners should ensure they have appropriate guidelines and resources in place for managing social media.

4. Discovery

Sometimes, we rely on brands to tell us 'what's on' by featuring events on their website home pages or in email newsletters. At other times, we land on websites already knowing what we want, and simply need a way to locate the activities that interest us.

While some partners are effectively showcasing cultural activities online, others are providing limited opportunities for users to discover what's on in Cheltenham.

We identified the following opportunities to enhance discovery of cultural activity in Cheltenham:

- While most of the partners support signup to email newsletters, they should be pushing this and other forms of 'subscription' harder. They should also be using location or interest data more intelligently to **target** communications to culturally-engaged audiences both inside and outside the region;
- There is currently no comprehensive online source for cultural activity in Cheltenham, with Visit Cheltenham's **listings** partly filling this gap. Portals such as leedsinspired.co.uk or more editorially-focused assets such as creativetourist.com could provide useful models for extending this important capability;

- While many partners provide facilities for website users to **search** cultural listings, they are not tracking these interactions or experimenting with different search options or user interfaces. As a result, they are missing important opportunities to listen and respond to audience needs.

5. Measurement & reporting

One great advantage of digital over traditional communications channels is that we can track engagement with online audiences in real time: where they're arriving from, what content they're looking at, even how much they're spending. By analysing how their websites and campaigns perform and by making incremental improvements, brands can shape digital strategies that are not only more measurable, but that actually perform better the longer they're around.

We found that Cheltenham is not yet exploiting the full potential of platforms such as Google Analytics to capture joined-up, actionable data about online interactions with cultural audiences.

We recommend that the partners address the following gaps and opportunities cooperatively, taking advantage of the Google Analytics infrastructure already in place and within a comprehensive cultural measurement, reporting, and optimisation (MRO) framework for Cheltenham:

- Work with a Google Analytics specialist to create a unified scheme for **measuring** key online behaviours such as listings search, email signup, and bookings that can be deployed across all partner websites. A common approach should not only result in lower overall costs, but also make it easier for partners to integrate their reports down the track;

- Many valuable interactions with cultural tourists take place **offline**, in museums and galleries, physical box offices, gift shops, or cafes. Cheltenham should explore how techniques such as voucher codes in combination with technologies such as Google Analytics Measurement Protocol might allow them to join up users' online activity to offline bookings or visits;

- Partners are attracting audiences to their websites through channels including social media, email, and - to a lesser extent - paid advertising. In consultation with an Analytics specialist, they should develop a **campaign tracking** approach that allows them to attribute what they spend on communications with downstream return-on-investment;

- The potential for digital technologies to transform audience engagement will only be realised when decision-makers at all levels have access to timely, reliable, and actionable data. Partners should work separately to create **private dashboards** that track key performance indicators (KPIs) such as sign up and booking rates.

- Commercial interests and privacy concerns mean that partners will always need to keep some information under their own hats. But their first instinct should be to share what data and insights they can, rather than to conceal what they can't. Cheltenham should develop **group reports** using off-the-shelf, affordable platforms such as Analytics Canvas that allow teams to benchmark their performance (anonymously or otherwise) against other partners.

6. Skills development

Whether your digital strategy succeeds will ultimately depend more on the people you employ than on the technologies they use.

We found that while Cheltenham's digital teams clearly include some committed and talented individuals, capabilities appear to be lacking (or are, at any rate, unevenly distributed) in key areas such as editorial, search engine optimisation, and analytics.

We recommend that forums such as the TPG be used to develop a programmed of **professional development** aimed at equipping team members with the knowledge, skills, and specialist support they will need to deliver complex, integrated digital engagement strategies

Since teams may initially feel out of their depth when asked to deliver some of these items, it will be important to provide as much structure as possible. We have, therefore, recommended drafting a series of **guidelines** to topics such as website accessibility (with a focus on organic search engines and social media), on-page content optimisation, cross-promotion, attribution, and social media marketing.

Next steps

This document reflects a broad, initial survey of only some of Cheltenham's cultural brands and assets. As it moves to the next stage of strategic development, the TPG will need to explore some areas in more detail. We have, therefore, recommended commissioning the following, more specific, research and planning items:

- An **SEO Code Audit** to identify opportunities for enhancing the technical accessibility of TPG websites to search engines. This will provide the basis for a comprehensive search engine optimisation plan;

- An **SEO Content Audit** to identify relevant and opportune keywords for home, section, category, and content pages on partner websites. This will provide a starting point for on-page content optimisation by editorial teams;

- A **Link Audit** to reveal the sources of links to all partner websites and identify broken links. This will provide a basis for partners' ongoing relationship building efforts;
- A **Social Media Audit** to provide insights around the volume of unique and non-spam subscribers, as well as cross-subscription between partner accounts. This will inform planning and optimisation of social media marketing activity;
- A **Direct Communications Audit** of email sign up forms, newsletters and other assets, as well as campaign-level data including bounce, open, and click-through rates. This will inform planning and optimisation of direct communications;
- A close analysis of **seasonal trends** in audience engagement across partner assets, including off-line. This will inform the planning, timing and geo-targeting of engagement activity, particularly partner cross-promotions;
- An in-depth review of **mobile** user engagement with existing assets and of mobile website usability. This will help to ensure that Cheltenham is making the most of this vital, fast-growing channel.

Implementing the recommendations in this document and developing an effective digital engagement strategy for cultural tourism will require an enduring commitment - not only from funding organisations and senior decision-makers, but also from individual team members at all levels.

We expect forums such as the Tourism Partnership Group to play a central role in this process, whether by shaping the overall direction, facilitating exchanges of skills and knowledge, or simply easing the inevitable spot of friction between partners.

E. PRIMARY REFERENCES

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xv. Tourism Economic Impact Assessment 2006, Cheltenham Borough Council
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xix. Value of Tourism 2009, South West Tourism
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xxi. South West Region Racecourse Profiling, 2008-13, Carat
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F. MAIN CONSULTEES

The audit stage of the process consulted with the following, individually and collectively as required, in addition to the Tourism Partnership Group, Cabinet Board, Executive Board and a Cabinet Members Working Group:

i. Councillor Steve Jordan, Leader, Cheltenham Borough Council
ii. Andrew North, Chief Executive, Cheltenham Borough Council
iii. Mark Sheldon, Director Resources, Cheltenham Borough Council
iv. Mike Redman, Director of Environmental & Regulatory Services, Cheltenham Borough Council
v. Tracey Crews, Head of Planning, Cheltenham Borough Council
vi. Wilf Tomaney, Townscape Manager, Cheltenham Borough Council
vii. Jeremy Williamson, Managing Director, Cheltenham Development, Cheltenham Borough Council
viii. Councillor Tim Harman, Group Leader Conservative, Cheltenham Borough Council
ix. Councillor Malcolm Stennett, Group Leader People Against Bureaucracy, Cheltenham Borough Council (unavailable)
x. Julie Finch, Chief Executive, The Cheltenham Trust
xi. Jo Stringer, Chair, The Cheltenham Trust
xii. Susie Hunt, Partnership Manager, Cotswolds DMO
xiii. Sally Graff, Tourism Manager, Cotswold District Council
xiv. Diana Shelton, Head of Leisure & Communities, West Oxon & Cotswold District Councils
xv. Jason Smith, Chief Executive, Marketing Gloucester (unable to fully contribute)
xvi. Stuart Heath, Head of Marketing Partnerships, VisitEngland (unable to fully contribute)
xvii. Louise Emerson, Chief Executive, Cheltenham Festivals
xviii. Ian Renton, Regional Director, The Jockey Club (Cheltenham Racecourse)
xix. Matthew Foxton-Duffy, Head of Marketing South West, The Jockey Club (Cheltenham Racecourse)
xx. Maxine Melling, Pro Vice Chancellor (Operations), University of Gloucestershire
xxi. Kevan Blackadder, Manager, Cheltenham Business Partnership
xxii. Michael Ratcliffe, Chief Executive, Cheltenham Chamber of Commerce
xxiii. Martin Quantock, Enterprise Partner (Retail), The Growth Hub
xxiv. Peter Christensen, Chair, Cheltenham Hospitality Association
xxv. Sam Holliday, Development Manager, Federation of Small Businesses

xxvi. Geradline McCullough, Cheltenham Area, Federation of Small Businesses
xxvii. Martin Bruton, LEP Lead Creative Industries, GFirst LEP
xxviii. Sara Tyler, LEP Lead Retail Sector, GFirst LEP
xxix. Sarah Danson, LEP Lead Business Membership Group, GFirst LEP
xxx. Mary Godwin, Relationship Manager, Arts Council England
xxxi. Geoffrey Rowe, Chief Executive, The Everyman Theatre
xxxii. Steve Wood, Chair, The Holst Birthplace Museum
xxxiii. Michelle Fyrne, Editor, SoGlos
xxxiv. Nicole O'Connor, Chair, The Lucky Onion Club
xxxv. Gareth Jones, Consultant, Hardisty Jones

G. MANAGING STAKEHOLDERS SUMMARY

If this proposition had been commissioned two years ago, the partner and stakeholder landscape would look very different. In this time The Cheltenham Trust has been created and commissioned to lead on culture, leisure and some elements of local tourism for the town. Also in 2014, the Cotswolds Destination Management Organisation was created by a group of local authorities to coordinate and develop the tourism programme for the area. Cotswolds DMO has also had some preliminary discussions with the town about locating in Cheltenham. Back in Cheltenham, the Council brought all the key tourism stakeholders together for the first time as a grouping under the banner of Cheltenham Tourism Partnership Group. In 2015/16, the commercial sector in particular is looking forward to a new Business Improvement District (BID) for the town centre. The common thread through all of these emerging resources is Cheltenham Borough Council – as catalyst, planner, seed funder, coordinator and provider of strategic oversight. So how can the town's tourism objectives be best met in this new management landscape?

Key partner stakeholders		
Who	**Role to date**	**Potential role within outcomes proposition**
Cheltenham Borough Council	The local authority has an historic and pivotal position for tourism development. As a commissioning council, CBC is clear that it can apply its resources internally or externally to generate best value and optimise outcomes. In tourism terms, this also acknowledges the variety of tourism stakeholders who do and will continue to contribute to the town's visitor economy. The Deputy Chief Executive is leading this process and a new Director level position within the authority for Place & Development will provide another key advocate and policy guide for tourism development in the coming years.	As a local authority it has a vision for Cheltenham which is about delivering the best quality of life for its people and believes that "making the town a world class cultural and learning centre which is outward looking and welcoming to visitors" is a crucial element to create a vibrant future for the town. This places tourism within a wider context, not only of economic development (which is being strategically reviewed locally and at a countywide level currently) but also of wellbeing, education and other vital agendas. All contribute to the 'sense of place'.
The Cheltenham Trust	The Council entered into a 10-year Management Agreement with the Trust to deliver its leisure and culture services. Within the services the Trust now runs is the day-to-day tourism service, notably the tourist information centre (located in The Wilson). The Council retains accountability as the strategic driver for tourism (within the wider context of economic development). The Trust is part of the Tourism Partnership Group. Budgets for tourism development and campaign activities are part of the overall revenue budget, which can be supported by a small Council revenue budget to support 'client-side activity'.	The Trust is tasked with supporting specific outcomes including: – Primary outcome – Cheltenham is seen as a world-class place to live, work, study and visit. – Secondary outcome – Cheltenham is recognised as an inspiring cultural and tourism destination. The Trust works with stakeholders, partners and other organisations to develop Cheltenham as a tourism destination and to work with stakeholders to develop and implement marketing strategies.
Cotswolds Destination	This development has been driven by the need to market the	Cheltenham is now in a position to consider additional

Management Organisation	product the visitor sees – the Cotswolds – and not the geo-political boundaries of individual councils spread across Gloucestershire (and beyond, e.g. West Oxfordshire). This model also should enable more engagement with the commercial sector. In June 2014, the Cotswolds DMO was created with the following vision: 'A vibrant year round destination where visitors enjoy high quality, authentic experiences and tourism makes an increasing contribution to the economic, social and environmental sustainability of the local economy'. In terms of the proposition for local authorities the DMO seeks to enable them to: – Maximise economic growth for their local economies; – Deliver locally for their businesses; – Benefit from the greater "pull" of a large, diverse destination.	investment where the DMO could be a vessel for delivering the town's desired tourism outcomes, including becoming a more prominent and leading partner sub-regionally.
Cheltenham Tourism Partnership Group	This group was brought together in 2014 to 'help develop the vision and provide a vehicle with which to engage with key stakeholders in developing the local approach to tourism promotion and to help maximise its contribution to the future well-being, vibrancy and economic success of Cheltenham'. Whilst it has not been very active to date, it does include all the main stakeholders required to inform, support and encourage tourism activities.	As a fledgling group it needs to assume the role and authority its remit indicates, which is: – To enable the effective coordination of tourism activities in Cheltenham; – To act as a sounding board for the development and monitoring of the Cheltenham Tourism Service Plan; – To consider and advise on how best to develop Cheltenham's tourism offer, vision, brand and strategy;

	Chaired by the Leader of the Council, the Group includes senior representation from the Council (executive and officer), The Cheltenham Trust, Cheltenham Hospitality Association, Cheltenham Festivals, Cheltenham Racecourse, University of Gloucestershire, The Growth Hub, Chamber of Commerce, Everyman Theatre, Cotswolds DMO and Cheltenham Business Partnership (who are leading in the development of the BID).	– To encourage and listen to feedback on the tourism service from relevant forums and help guide future improvements to the service; – To foster positive economic relationships with local, regional and national partners, including those in the public, voluntary and private business sectors; – To act as a champion for the promotion of Cheltenham's tourism offer, promoting both accessibility and sustainability; – To facilitate the collection and analysis of tourism data; – To ensure the Cheltenham vision fits with the Cotswolds DMO vision; – To commission an analysis/audit of Cheltenham's consumers, competitors and list of threats and opportunities.
Cheltenham BID *(subject to funding)*	BIDs are now a well-established development agency model for town centre and commercial districts across the country. The new Cheltenham BID, should it be awarded the official status, has a vision to 'create a vibrant and prosperous Cheltenham in which businesses work together to improve the town', and 'encourage many more people to visit the town centre through exciting events and initiatives'.	Whilst a number of business fora already exist, this provides a new and powerful voice for local businesses and trade associations in the future of the town centre, being responsible for over £2m investment during its 5-year lifespan. Priority areas will include more effective marketing, car parking, new events, (infra)structural improvements and business support. Whilst this is not directly tourism, the BID has a potentially significant role to play in the town centre offer, especially events. A ballot of businesses is scheduled for Spring 2016 to approve the BID.

Marketing Gloucester	Marketing Gloucester – a public private partnership – in its short-life-span demonstrates what can be achieved via a purposeful and single-minded approach to the positioning, product and marketing development of a destination. Marketing Gloucester's role is to raise the profile of Gloucester and help attract inward investment – therefore a Destination Marketing Organisation more than a Destination Management Organisation – and inject a sense of pride and passion back into the city.	The organisation has three key work-streams: investing in and promoting brand building major events and festivals; more generally promoting Gloucester as a place to (live, work and) visit locally, nationally and internationally; delivering innovative campaigns that showcase Gloucester's heritage. It actively seeks to be the destination marketing fulcrum, engaging with businesses and investors, and building key partnerships with Gloucester City Council, GFirst LEP, Cotswolds DMO and Gloucestershire County Council. They have a team of seven, including three events specialists, a digital marketer and a commercial development role. As a model it has much to commend it, backed as it is by significant investment, ahead of longer-term plans for self-sustainability.
GFirst Local Enterprise Partnership (LEP)	GFirst LEP was established in 2011 to drive economic growth in Gloucestershire. In partnership with the business community and the public and voluntary sectors, GFirst LEP developed a vision for growing Gloucestershire that by 2022, the county will have 'world class companies, a diverse business portfolio and a reputation for starting and growing great businesses'.	The Strategic Economic Plan does not cite tourism as a main priority, although it does recognise that tourism can be a driver for growth and indirectly benefit from rural business grants etc.

H. GLOSSARY OF TERMS & ABBREVIATIONS

Word	Meaning
ALMO	See Arms Length Management Organisation.
ArkLeisure® / Arkenfold	ArkLeisure® is a research and segmentation model, developed by a company called Arkenfold, to enable better understanding of current and potential customer bases. A subscription service, ArkLeisure® provides a regularly updated overview of the UK market facilitating informed strategic and tactical planning of both marketing and new developments – notably **demographic** profiles. It has been extensively used in tourism, and has some cross-over with the cultural sector.
Arms Length Management Organisation (abbrev. **ALMO**)	An Arms Length Management Organisation is typically a not-for-profit company created by local authorities or regional agencies under a management/service level agreement to develop an existing agenda, e.g. housing, tourism, culture.
Art Weekender	A common name for boutique or niche cultural events that are designed to showcase the wider offer, including smaller and 'hidden gem' venues and cultural programmes alongside larger and better known cultural establishments, over a weekend.
Audience Finder	Audience Finder is a free national audience data and development tool, enabling cultural organisations to understand, compare and apply audience insight. It has been developed by The Audience Agency, and commissioned by Arts Council England. www.audiencefinder.org.
Audience segment (segmentation)	Any group of users or customers who share one or more features, whether demographic (e.g. age), geographic (e.g. location), or behavioural (e.g. 'viewed more than three web pages').
Audit	A situational analysis, using selective analytical tools like SWOT (strengths, weaknesses, opportunities, threats), gap analysis, literature review, desk research and primary research (e.g. interviews). This creates a 'snapshot' picture of the situation a product/service/organisation/offer is in at that moment in time.
B2B and B2C markets	B2B is Business-to-Business markets, e.g. trade, and B2C is Business-to-Consumer markets, e.g. direct to the general public.
Branding & positioning	Brand positioning describes how a brand is different from its competitors and where, or how, it sits in a particular market. A brand hierarchy refers to a number of brands within one grouping (e.g. Ford as primary brand, with Focus and Mondeo

	as sub- or product brands) that contribute to the overall brand positioning.
Challenger brand	A challenger brand is a product brand in an industry that is not the major brand/market leader. The term denotes the fact that such companies have to compete from a position behind the dominant player or leader in an industry. This makes the process of marketing significant to attracting customers. In the tourism sector, market leading destinations are sometimes called 'attack brands' in contrast to '**challenger brands'**.
Cheltenham Development Task Force	The Cheltenham Development Task Force is a Council unit, based within Environment and Planning, focused on developing the central area of Cheltenham. The purpose of the task force is to bring together the private, public and voluntary sectors in partnership, as the way to progress the challenges and opportunities presented. www.cheltenham.gov.uk/info/200133/cheltenham_development_task_force
City of Culture / Capital of Culture	City of Culture UK is a national government competition that awards the designation to a city/town every four years for a period of one year. The city/town in question uses the designation to build a major programme of events, plus stimulate capital and inward investment through cultural tourism and development. Derry was the first winner in 2013, followed by Hull in 2017. The next stage of bidding is underway. Capital of Culture is the European Capital of Culture status that was afforded to Liverpool in 2008. Now two cities from different parts of Europe share the designation in the same year. The UK City of Culture is the UK version of the European Capital of Culture. The UK will share the designation with Hungary in 2023, the bidding process for the UK has not yet been announced.
Concierge model	A destination-wide approach to sharing the latest visitor information – things to do, places to eat/drink, how to get there, top tips and packages/itineraries etc. – that can be used by hotels and accommodations providers, but also eateries, visitor attractions, culture and heritage venues, independent retailers, transport workers (e.g. taxi drivers). This requires a degree of coordination, training and management over time to enhance the visitor experience and build consistency through individual organisations promoting each other alongside their own offer.
Culture	Collective term incorporates visual (art galleries, artists, public art, craft) and performing arts (music, dance, theatre, outdoor performance), literature, sports and heritage assets and related programme, events, festivals and activities, live and online. Contemporary culture is often used as a term to define new art works.
Cultural tourism	A detailed overview of cultural tourism is available at: www.creativetouristconsults.com/blog/cultural-tourism/jam-

	tomorrow-the-principles-of-cultural-tourism/.
Data mining	Data mining is an analytical process of discovering new patterns (sequences, trends, clusters) in existing data sets (that may have been created through previous research activity) involving by asking new questions of the data through a mix of methodologies that can include statistical analysis and database systems. This approach can inform forecasting and subsequent planning.
Demographics (specif. visitor/market)	A particular **segment**/section of the population that can be defined through statistical data, commonly characteristics including age, location/postcode, gender, job/role, ethnicity.
Destination Management Plan (abbrev. **DMP**)	A Destination Management Plan (**DMP**) is a shared statement of intent to manage, develop and promote a destination over a stated period of time. It articulates both the roles of the different stakeholders, identifies clear actions that they will undertake and the resources they will allocate. It is a common requirement for destinations to produce DMPs for their stakeholders, notably VisitEngland, as part of regional and national planning and priority-setting.
DMO	Destination Management Organisation, which refers in general to tourism agencies that can have a mix of public and private funding, with an official remit recognised in a national context by VisitEngland and Visit Britain. This applies to Cotswolds DMO and Forest of Dean & Wye Valley DMO, who market the region and support tourism services and product development. DMO can also on occasion refer to a Destination Marketing Organisation, which denotes an organisation that acts to promote a destination in more general terms, but also in tourism terms. They tend not to focus on tourism services, product development and quality standards as tourism Destination Management Organisations do, instead focusing on major marketing campaigns and event programmes to attract visitors, investment and commerce. Marketing Gloucester fits this model.
DMP	See **Destination Management Plan.**
EAV	See **equivalent advertising value.**
Equivalent advertising value (abbrev. **EAV**)	The calculation of the value of media coverage – in print and latterly online – if the page coverage (size of article) was purchased as a paid advertising placement. This provides an industry standard value for media coverage, although multipliers can often be attached, and the advent of online media has made calculation less reliable. This does not apply to coverage on BBC channels or other that do not carry advertising.

GREAT Britain campaign	A UK government campaign that aims to promote the UK internationally as a GREAT place to visit, study and do business.
Gloucestershire Growth Deal	A partnership between the University of Gloucestershire and GFirst LEP to enable businesses to achieve their growth potential. The Growth Deal aims to ensure business access to support services are in place across the county. Science, Technology, Engineering, and Mathematics (STEM) centres deliver provision across Gloucestershire.
Key Performance Indicators (KPIs), (can be specif. 'engagement key performance indicator').	Any metric that relates to a behaviour identified as critical to the success of a (brand's) engagement strategy. KPIs may either be expressed in aggregate (i.e. how many users completed a purchase, overall) or broken down by a particular dimension (e.g. how many users from London completed a purchase).
KPIs	See **key performance indicators**.
Request for information (abbrev. **RFI**)	The formal process of drawing up a list of sources of information – studies, reports, documentation, references, links and contacts – that will enable an analytical, feasibility or other strategic process to proceed from induction to **audit**.
Meetings, incentives, conferences, events (abbrev. **MICE**)	A tourism **segment** that refers to business tourism. It typically denotes large groups, usually planned and booked well in advance, that are brought together for a particular commercial, promotional or educational purpose. Recently, there has been an industry trend towards using the term 'meetings industry' or 'events industry' to avoid confusion from the acronym.
MICE	See **meetings, incentives, conferences, events.**
Narrative (specif. tourism or cultural tourism)	The underlying story that a destination tells to support its **positioning** and carry its key messages to the marketplace, in an engaging and distinctive way.
Place-making	Place-making is a multi-faceted approach to the planning, design and management of public spaces. Place-making capitalises on a local community's assets, inspiration, and potential, with the intention of creating public spaces that promote people's health, happiness, and wellbeing, promoting a positive sense of place and civic pride.
Return-on-investment (abbrev. **ROI**)	**Return-on-investment** (abbrev. **ROI**). The ratio of profits to costs, expressed as a percentage. ROI provides a rough measure of the overall efficiency of a brand's engagement strategy. 'Profits', in this context, may include revenue from sales, as well as income from funding, or even potentially valuable behaviours such as email sign-ups. 'Costs', meanwhile, should reflect a brand's expenditure on all engagement **assets** and **capabilities**.
RFI	See **request for information.**
ROI	See **return-on-investment**.

Staycation	A holiday spent in one's home country rather than abroad, or one spent at home and involving day trips to local attractions. Following the financial crisis of 2008, this market became increasingly important to UK destinations.
STEAM	STEAM stands for the Scarborough Tourism Economic Activity Monitor. STEAM is a tourism economic impact modelling process which approaches the measurement of tourism from the bottom up, through its use of local supply side data and tourism performance and visitor survey data collection. STEAM aims to deliver robust outputs at a variety of geographical levels and, as such, has been adopted for use throughout the United Kingdom and overseas by tourist boards, local authorities, regional development agencies, national park authorities, and many other public and private sector organisations.
T-stats	T-Stats is a tourism statistics database. It is an independent, commercial tool for analysing the visitor economy, providing a platform for data collection and a means to track, manage and grow tourism plans. www.t-stats.co.uk
UNESCO City of…	These are designated creative cities of culture, relating to specific artforms, e.g. film (Bradford), literature (Norwich), design (Dundee), media arts (York). The creative cities network currently has 116 members from 54 countries. The UNESCO Creative Cities Network (UCCN) was created in 2004 to promote cooperation with and among cities that have identified creativity as a strategic factor for sustainable urban development. The cities which make up this network work together towards a common objective: placing creativity and cultural industries at the heart of their development plans at the local level and cooperating actively at the international level.
Visitor economy	This is a catch-all term often used to define the tourism market for any given destination of product. It places more emphasis on all contributors to the visitor experience, its quality and value, spanning public, private and third sectors.
Wraround (specif. 'offer')	A collective term for hospitality, retail and general visitor services (including information and transport for example) that 'wraps around' the core attractions of culture, heritage, events and attractions.
Digital-specific	
Asset (specif. 'engagement asset')	Any component of an engagement strategy, including web domains, websites, content, social media accounts, customer data, marketing platforms, and skilled personnel - as well as brands themselves. These assets represent investments of time and money which should be taken into account when calculating return-on-investment from a brand's engagement strategy.
Capability (specif. 'engagement capability')	The ways in which a brand is able to engage audiences by deploying the **assets** that it owns or controls. Core capabilities for a digital engagement strategy may include email marketing, editorial, or **search engine optimisation**.

Content (specif. 'web content')	Information published on a website in the form of text, images, video, audio, or other files, as well as **meta data**.
Conversion rate optimisation (abbrev. **CRO**)	A set of techniques that brands can use to increase **return-on-investment** from their engagement strategy by experimenting with different creative or targeting approaches, by measuring the outcomes of those experiments on audience behaviour, and by constantly 'changing up' their assets and capabilities to deliver better return-on-investment.
CRM	See **customer relationship management**.
CRO	See **conversion rate optimisation**.
Customer relationship management (abbrev. **CRM**)	A set of techniques that brands can use to promote **engagement** with individual audience members by compiling information about subscribers and customers, then by using that information to deliver targeted and personalised communications.
Dashboard (specif. 'engagement dashboard')	A simplified reporting interface within a platform such as **Google Analytics** that shows a configurable selection of highly concise reports. Dashboards are normally designed to provide highly actionable, 'glance-able' views of engagement **key performance indicators** (e.g. 'subscription rate' or 'ecommerce conversion rate') broken down by audience segment, channel, campaign, etc.
Digital infrastructure	A general and overarching term to represent the collective platforms, **assets**, **analytics, CRM**, **MRO, property**, **structured data** and so on, that is held/owned by the brand, organisation or contributing partners.
Dimension	Any way of describing a **metric**, for example by **audience segment** or content grouping.
Engagement	The systematic process whereby brands and audiences build sustainable and mutually rewarding relationships through a set of structured on- or off-line interactions. CTC's RAISE engagement framework identifies the five sequential objectives that brands must meet to drive successful engagement with audiences - whether on- or off-line: – **Reach** audiences through email or other direct communications, on search engine results pages, or through referral by peers or other influencers; – **Attract** users to websites from media, sources, and campaigns; – **Involve** website users by helping them to discover information that speaks directly to their needs; – **Satisfy** audience needs for products or services (while also satisfying organisational needs for revenue or funding) by encouraging people to transact, e.g. by buying tickets or visiting venues; – **Extend** engagement with individuals and to wider audiences by providing content and experiences that people will want to subscribe and share.

Google Analytics	A widely-used platform for capturing data about online audiences and their interactions with websites, apps, and other digitally-connected **properties**.
Keyword	A word or phrase that a user enters into a **search engine** and that describes the information they are looking for. Keywords are normally written in lowercase and surrounded by double quotation marks (e.g. "things to do in manchester").
Keyword theme	The topic of a web page, as reflected in the **keywords** that appear as part of the page **content**.
Link (specif. 'web hyperink')	A reference to an item of content through which a website user can access that content, e.g. by clicking.
Measurement, Reporting, and Optimisation (abbrev. **MRO**)	A set of platforms and practices whereby brands: – Capture anonymised information about individual users, such as their location (e.g. 'London') or the channel through which they reached a website (e.g. 'email'); – Capture data about the behaviour of those users, such as which pages they viewed on a website or whether they visited a physical venue; – Create reports (or simplified **dashboards**) that compare how different **audience segments** behaved or how different **digital assets and capabilities** performed in terms of identified **key performance indicators;** – Use those reports to develop 'actionable insights' for **conversion rate optimisation.**
Meta data (specif. 'web page meta data')	Structured information that describes content on a web page so that search engines can understand what that content is about (see **keyword theme**).
Metric (specif. 'engagement metric')	Any number that describes the behaviour of a system. In the context of their engagement strategies, brands may use metrics to measure the *volume* of users at each touch point, the *rate* of flow between touch-points (e.g. the percentage of users who commenced but did not complete a purchase), or the financial *value* generated as a result of those interactions (e.g. revenue in GBP/£ from ecommerce transactions).
MRO	See **Measurement, Reporting, and Optimisation**.
Organic search engine results	Non-paid links to web content that appear on **search engine results** pages (contrast **paid search engine results**). Search engines generate these results by matching a user's search term against **keywords** in web content, then use sophisticated algorithms to determine the order in which links to those items appear.
Paid search engine results	Advertisements that appear alongside organic links on search engine results pages. Brands may configure these advertisements to appear only when users search for certain keywords and may bid against other brands for visibility -

	normally paying only when users click through to their websites.
Property	Any front-end or user-facing component of a brand's engagement strategy such as a website, a mobile app, print collateral, or even physical venue.
Search engine (specif. 'web search engine')	An online system such as Google.co.uk that compiles a database of **content** available on the web, allows users to query that database by entering a search term or **keyword**, then presents a set of **search results** that relate to the keyword.
Search engine optimisation (specif. 'organic search engine optimisation'; abbrev. **SEO)**	A set of techniques that brands can use to promote **engagement** with audiences on **search engines** by publishing more relevant web **content**, by making that content more accessible to search engines, and by making that content more visible on **search engine results** pages.
Search engine results (specif. 'web search engine results')	A list of links to web pages or other web **content** that is provided by a **search engine** in response to a user's query. The links that appear on search engine results pages typically include a mix of **paid** and **organic search engine results**.
SEO	See **search engine optimisation**.
Structured data	Any of several standardised methods (e.g. schema.org) for organising and storing data such as venue or event listings and for making that content comprehensible to search engines and their users. Structured data can also make content more accessible to website users with restricted vision or other impairments.
User generated content (abbrev. **UGC)**	Any form of content such as blogs, wikis, discussion forums, posts, chats, tweets, podcasting, pins, digital images, video, audio files, advertisements and other forms of media that was created by users of an online system, platform, portal or service.
UGC	See **user generated content.**