



Visitor Evidence Base Report

September 2012

A summary and analysis of three strands of research into the visitor economy in St Albans City and District in 2012.



Executive Summary

Tourism is set to be the fourth fastest growing sector in the UK and in England. It is predicted to grow in real terms by 3% per year between 2010 and 2020 (Deloitte and Oxford Economics, 2010, p. 57). St. Albans City & District Council views the visitor economy as an important contributor to the economic future of the district. However, the Council considers that the district's tourism offer is not currently realising its potential.

To improve the management and promotion of the visitor offer, the council is developing a visitor economy strategy with key stakeholders in the district, which is to be informed by this report.

This Visitor Evidence Base report summarises the findings of three strands of research:

- An analysis of data estimating the volume and value of tourism in the district;
- Original survey research into visitors and non-visitors to the district; and
- Benchmarking research into how St Albans is performing against comparable UK destinations.

The report analyses the implications of the findings for the development of a visitor strategy in St Albans City and District.

The visitor economy in St Albans

Although total spending in the visitor economy in the UK fell in real terms by 3% during 2007 to 2009, the visitor economy in St Albans has remained stable. In 2010, St Albans City and District:

- Received around 1.6 million visitors of which 1.3 million were day visits and 0.3 million staying visits
- Received an estimated £107 million in visitor spend
- Supported an estimated 2,580 jobs from visitor spend

- Welcomed 40% of trips for leisure, 38% visiting friends or relatives and 18% on business
- Saw 74% of visitors arriving by car and 26% by public transport

Although St Albans is not a particularly well known destination, satisfaction levels amongst visitors are high.

Room for improvement

Research with comparable destinations indicates that St Albans is not attracting the numbers of visitors it has the potential to reach. There is room for significant growth. Other destinations aim for growth of between 1% and 3% in real terms per year. St Albans should easily be able to achieve growth of at least 3% per year.

Comparable destinations have significantly more coordination amongst stakeholder in the visitor economy, especially for marketing purposes. A growing trend is to move towards a formalised public-private partnership (PPP) for marketing and the management of many other elements of the visitor economy. Business Improvement Districts (BIDs) have also been set up in other destinations.

This research found a number of ways in which the visitor economy in St Albans could be strengthened and expanded in the following areas:

- Target setting for growth and identification of primary and secondary target markets
- Improving visitor products
- Marketing
- Targeted infrastructure improvements
- Ongoing monitoring of the visitor economy
- Creation of an appropriate management vehicle
- Stakeholder engagement and improved coordination

The research summarised in this report generated a number of recommendations for the visitor economy and the development of a visitor strategy in St Albans. These are summarised in the following list.

Recommendations

Target for growth of the visitor economy

- Adopt a target for growth of the visitor economy in St Albans of at least 3% above inflation
- Aim to increase the volume of both day and staying visitors
- Aim to increase and influence word-of-mouth recommendations
- Aim to increase the volume of overseas visitors

Development of visitor products

- Consider developing specific products for leisure visitors, those coming for shopping trips and those coming to visit friends and relatives
- Ensure the district retains a good range and quality of shops
- Develop specific countryside products and associated marketing
- Investigate the potential to build more coordinated visitor products
- Consider setting up a Residents Pass
- Consider further promotion of the Residents First weekend

Business tourism

- Develop a separate business visitor strategy

Events

- Consider creating a larger Christmas event to capitalise of high spending in the festive period
- Re-assess the programme of events and create a plan which builds in equitable costs and rewards for all stakeholders.

Marketing

- Identify primary and secondary markets and target specific marketing to each group
- Develop and market short break packages
- Investigate ways to improve the TIC for visitors
- Continue publishing visitor brochures
- Create an image bank for marketing purposes
- Investigate setting up a bookings service and / or itinerary planner on the website

- Create links between the www.enjoystalbans.com website and websites of attractions, hotels/B&Bs and Visit England.
- Continue to invest in improving the www.enjoystalbans.com website
- Invest in raising the ranking of www.enjoystalbans.com on Google
- Aim to capitalise on high satisfaction ratings with increased word-of-mouth recommendations
- Consider undertaking research to understand how residents currently perceive the visitor offer and how their opinions may be influenced
- Increase awareness among residents of the visitor offer
- Use social media and recommendation websites (e.g. Trip Advisor) to influence and generate recommendations
- Investigate whether there would be value in investing in brand design work

Infrastructure

- Conduct detailed analysis on car and coach parking
- Investigate ways to transport visitors arriving by public transport to attractions outside urban areas
- Aim to increase the number of visitors arriving by train

Continuous monitoring

- Purchase and analyse Cambridge model volume and value data every 2-3 years (in particular, visitor numbers and associated spend and employment figures)
- Join British Destinations to participate in benchmarking studies with other UK historic cities
- Conduct a visitor survey once every 2-3 years
- Collect (or outsource the collection of) quarterly accommodation occupancy rates and visitor numbers to attractions in the district
- Collect quarterly visitor numbers to Council-owned attractions including Tourist Information Centres
- Liaise with external stakeholders (e.g. businesses) through quarterly networking events or meetings with particular interest groups (e.g. hotels group or attractions group). The Chamber of Commerce may be a partner in this
- Measure ongoing ROI by comparing the amount spent on tourism by the Council to the total amount of visitor revenue in the district
- Aim to measure the effect of specific marketing campaigns (e.g. by looking for increases in website visitor numbers)

Stakeholder Coordination

- Encourage stakeholders to set up special interest groups to work together in the development and marketing of visitor products
- Carry out an options appraisal with stakeholders for the creation of a new management vehicle

Visitor strategy development

- Ensure the 2013-2018 visitor strategy is in line with expected budget, staff resources and stakeholder commitment
- Limit the number of objectives in the visitor strategy to between three and five
- Ensure the visitor strategy is linked to the Council's overall priorities and objectives, as well as the Sustainable Community Strategy
- Write a detailed action plan to accompany the visitor strategy and consider writing tailored action plans for each key stakeholders
- Ensure there is a designated person responsible for driving forward the strategy and coordinating regular progress meetings