Regional Tourism Strategy

2019 – 2029

WEST MIDLANDS

WINDRUSH

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OUR VISION

Together, through telling the stories of our destinations, we will reveal our hero themes and products to attract visitors, transform perceptions and promote inclusive growth to ensure our industry partners thrive.

WEST MIDLANDS

Foreword

Andy Street, Mayor of the West Midlands

The West Midlands is home to a vibrant, diverse visitor economy that welcomes tourists, major events and conferences from across the globe. From winding waterways to energetic festivals, vast venues and culinary innovations, the region has firmly put itself on the map.

Our tourism industry also makes a significant economic impact on the region, welcoming 131 million visitors in 2018, whose spend generated £12.6 billion for the local economy. But beyond the numbers, our unique mix of rural landscape and cosmopolitan spaces, supported by the cultural heritage that runs deeply through this region, gives us a sense of place to be proud of. A place that others want to explore and experience for themselves.

With milestone events on the horizon – including Coventry City of Culture 2021 and the region hosting the Commonwealth Games in 2022 – there is no better time to highlight why our global audiences should come and see the West Midlands for themselves.

Our Regional Tourism Strategy aims to build on this success and support the growth of the visitor economy, so that it can reach its full potential and contribute further to the wider economic resurgence of the West Midlands. It is an ambitious framework that spans the next decade, as we want to create 19,000 inclusive jobs and generate an extra £1.1 billion for the local economy.

The Strategy recognises the strengths of both business and leisure tourism to different areas of our region. It was developed by a range of organisations and companies across the public and private sectors, led by the West Midlands Growth Company, and it is vitally important that we continue to work together as a region, to fulfil our aspirations for this industry.

I look forward to working with you all to deliver this exciting vision for the West Midlands.

The strategy focuses on growing the regional economic impact of tourism by creating greater awareness of the region, its key themes and its tourism assets.

Executive Summary

This Strategy establishes a roadmap for tourism in the West Midlands. It has been developed by West Midlands Growth Company in collaboration with multiple stakeholders and partners across the private and public sector.

The strategy focuses on growing the regional economic impact of tourism by creating greater awareness of the region, its key themes and its tourism assets. The two main strategic goals of the strategy are:

- **Increase the number of visitors from the UK staying in the West Midlands**
- **Encourage greater numbers of international visitors to visit the West Midlands**

A Real Opportunity

The West Midland's unrivalled connectivity, strong leisure assets, internationally known brands and strength in business tourism are solid strategic foundations for this strategy. The hosting of two major events in the early 2020s, provides the region with a once in a generation opportunity to build its profile as one of the strongest tourism economic areas in the UK.

The full exploitation of the upcoming major events provides the West Midlands with an opportunity to reposition the way the region is viewed, growing the value of the industry from £12.6 bn to £13.7 bn in 10 years, creating a further 19,000 jobs.

This can only be achieved by strong partnerships between public and private sectors, working together to increase the impact of the events. Brexit issues and other global headwinds are combining to create a more challenging market environment – with a 3% decline in international tourist numbers UK-wide and an 8% decline in the region in 2018. The vision of this strategy is to fully exploit the West Midlands' strengths in order to transform the awareness and perceptions of the region, its places and its people. Its aim is to drive growth in both leisure and business tourism, improving productivity and delivering economic benefit for business and the wider community.

The Strategic Framework

This strategy has been aligned to existing policy documents including the Strategic Economic Plan and the West Midlands Local Industrial Strategy. This strategy should be seen as a framework to stimulate activity from a range of organisations working flexibly and in partnership. Coordination and oversight of its delivery will lie with the West Midlands Growth Company but its success will lie with many organisations that see the potential and can provide the inspiration and support for delivery.

The following framework (p8) outlines 6 key objectives which will be used to drive regional growth. Key elements within this framework are:

- Focusing on the City of Culture and the Commonwealth Games to build the awareness of the regional tourism offer
- Celebrating success by the launch of a region-wide awards scheme
- Promoting regional product by the hero themes of Designer Maker, Waterways & Gardens, Iconic Historical Stories, Visual Arts and Festival & Foods
- Creation of a regional bidding Bureau focussing on business tourism and sporting events
- Use tourism to build the skills base within the region, working with the WMCA Skills Board to support a youthful and diverse population.

Executive Summary: The Strategic Framework

Opportunities

- The major major events
- Central UK positioning
- Breadth of tourism assets
- Core brands with international cut through
- Major urban regeneration
- Strong sports and cultural offer
- The UK's leading business tourism product
- Leading international brands and breadth of offer
- Up to date Consumer Insight
- Consensus on partnership working.

Vision

- Through telling the stories of our destinations, we will reveal our hero themes and products to attract visitors, transform perceptions and promote inclusive growth, to ensure our industry partners thrive.

Cross-cutting Themes

- Provide opportunities for a young, diverse and growing population
- Develop regional partnerships to maximise the chances of success
- Draw on best practice from around the world and innovation from other sectors.

Strategic Goals

- Increase the number of UK visitors staying in the West Midlands
- Encourage greater numbers of international visitors to stay in the West Midlands.

Objectives

- Raise the visibility and awareness of the region to international markets
- Improve the image and the perceptions of the Region to UK audiences
- Ensure greater awareness of the business tourism product
- Develop the leisure product using hero themes, attracting visitors across the region
- Provide new jobs and skills for people living in the region
- Connect tourism activity with other regional programmes to maximise impact.

Use the Strength of the Region's diverse Cultural Offer as the Underpinning Foundation for the Strategy

- Tourism is a key part of the Placemaking toolkit. Not only does tourism benefit from strong place-perception, it also contributes to shaping and showcasing it.
- There is a recognised link between places that are known for having a strong cultural offer and their increased economic and tourism performance.
- The region is strong in 'culture' and rich in heritage, arguably more so than many other regions, but isn't yet known for it. Culture needs to become part of the place narrative, primarily as a driver that will shift perceptions and change image.

Context

The analysis for this strategy focused on the West Midlands Combined Authority area and the three Local Enterprise Partnerships: Birmingham & Solihull, Coventry & Warwickshire and The Black Country. The strategy's recommendations, however, go wider and its implementation will be strengthened by partnerships that are drawn from across the West Midlands region and beyond including the Midlands Engine.

Methodology

This strategy was based on extensive research, drawn from multiple sources, as evidenced by Appendix I. Sources included:

- In depth analysis of trends in tourism volume and value across the region
- Original perceptions and awareness research undertaken in the UK and five overseas markets
- Over 25 individual consultations with senior stakeholders were conducted against a standard framework.
- Six workshops focusing on:
  - The market, industry trends and the factors that have the potential to influence the growth of tourism to the region
  - The assets that underpin the industry's current success and its future potential
  - The views of the private sector in terms of the core regional priorities and their delivery
  - The role of government and its agencies in facilitating growth and support to the industry at a time of significant funding pressure and numerous other priorities.

The Significance of Tourism

In 2018 the tourism sector generated an income of £12.6bn. It accounts for an estimated 135,725 jobs in the WMCA area, which represents 5% of the current working population.

Trends Influencing Tourism

Like other sectors the tourism industry has gone through recent seismic change, disrupted by digital sales and marketing channels and an increasingly demanding and dynamic customer, who has more choice, books later and has greater market power.

This strategy has been prepared in the context of the UK Government's Brexit negotiations, and the wider macro economic uncertainty caused by US/China relations, climate change and tensions in the Middle East.

Tourism forms one of the key sector strengths which are the building blocks of our local industrial strategy, as illustrated in appendix II. Having a regional approach, which works in collaboration with different parts of the region and with the wide range of public and private sector partners will be key to maximising our ability to leverage the impact of the forthcoming major events and also maximise growth in overnight UK visitors and international visitors.

Context – Tourism Landscape

The tourism sector makes a significant economic contribution to the West Midlands. It provides employment to over 135,000 people and supports the vibrancy of towns and city centres via its cultural* and food and drink establishments.

*** What is meant by Culture**

The Region's cultural offer has extraordinary depth and quality. Culture does not only refer to theatre, dance, classical music and visual arts. To maximise the opportunity, the region should also draw inspiration and product from an eclectic mix of heritage, sport, design, architecture, food & drink, experiences, fashion, festivals and people.

The Market

According to recent Visit England data some 5.5 million UK tourists spend £860m per year staying in the region, while International Passenger Survey data indicates that a further 1.9m international visitors spend a further £648m.

Day visitors make up the majority of spending volume but their spending value is much lower therefore this strategy will focus on growing both overnight UK visitors and increasing international visitor numbers, to raise the economic impact of tourism to the region.

The Local Infrastructure

A range of different stakeholders play a part in sustaining the regional tourism economy, which is illustrated below:

- **Skills**
  - Educational Bodies
  - Local Authorities/LEPs
  - Businesses
  - WMCA
- **Product**
  - Businesses
  - Cultural/Sporting Organisations
  - Local Authorities
- **Infrastructure**
  - WMCA
  - Local Authorities/LEPs
  - Transport Businesses
- **Place**
  - Local Authorities
  - LEPs
  - BIDs
  - Businesses
- **Promotion**
  - WMGC/DMOs
  - Businesses
  - Visit England/Britain
  - Local Authorities

Context – The Economic Impact of Visitor Economy in the West Midlands

New insight drawn from the WMGC's Scarborough Tourism Economic Assessment Monitor (STEAM) reveals the huge significance of the visitor economy to the region. In 2018, a total of £12.6bn was estimated to have been spent by visitors on accommodation, food and drink, recreation, shopping and transport across the region.

Figure 1 – value by LEP

Value by LEP (£million)	2018
Black Country LEP	£1,099
Coventry & Warks LEP	£1,831
G. Birmingham & Solihull LEP	£9,630
WMCA	**£12,560**

Figure 1 shows the dominance of the Greater Birmingham and Solihull LEP which accounts for three quarters of demand. An estimated 105,285 full time equivalent jobs (FTE) are directly the result of the tourism industry with another 30,440 FTEs resulting from indirect and induced spending underpinned in the supply chain. Shopping expenditures are an important element underpinning jobs in the visitor economy (STEAM, 2018).

The Market Base Line

The region attracted 131.4m* visits in 2018, which was 2.6% increase over 2017. The vast majority of these were day visitors as is the case in other regions. Overnight visitors increased by 300,000 against 2017, which is above the longer-term growth trend. Around 50% of these used serviced accommodation - with the remainder staying with friends and relatives and non-serviced accommodation.

Serviced accommodation (hotels only) occupancy across the region was 74.8%, a rise of 0.8% over 2017. UK regional average rate was 76.1% in 2018, 0.2% higher compared with 2017.

Figure 2 - Value by Type of Spend

Value by Type (£million)	2018
Accommodation	**£858**
Food & Drink	**£1,797**
Recreation	**£1,195**
Shopping	**£4,453**
Transport	**£1,112**
Indirect Expenditure	**£3,145**
WMCA	**£12,560**

At the same time, however, Brexit issues negotiations and other global headwinds are combining to create a more challenging market environment – with a 3% decline in international tourist numbers UK-wide and an 8% decline in the region in 2018.

The Product

Revenues are generated across the region by circa 1,000 accommodation providers, 200 visitor attractions, 386 specialist business tourism facilities and over 600 food and drink establishments with a focus on the visitor economy.

Almost 100 hotel developments are currently underway but not yet open. Further product information is given in Appendix I.

Context – Reason for Visitor Journey

UK/Domestic Market

Visiting Friends and Relatives (VFR) is currently the largest part of the domestic market. It is 42% of the volume, but 26% of the spend, as VFR visitors typically spend less on accommodation.

Holiday or leisure travellers are 24% of the volume but 35% of value and business travellers account for 29% of the volume and 34% of the spend, therefore the strategy recommends maintaining the VFR segment but growth of the holiday and business markets.

International Market

Business tourism is the largest volume market.
The regional business offer is strong with established venues such as the NEC targeting the international opportunity and new venues such as the Ricoh focusing on growing the domestic market across a range of events.

The relatively low share of leisure travel among domestic and international visitors suggests a current under-development of the leisure tourism sector in the region, and opportunities for growth if products are developed and promoted appropriately.

Regional Variations

There is much variation across the region: :

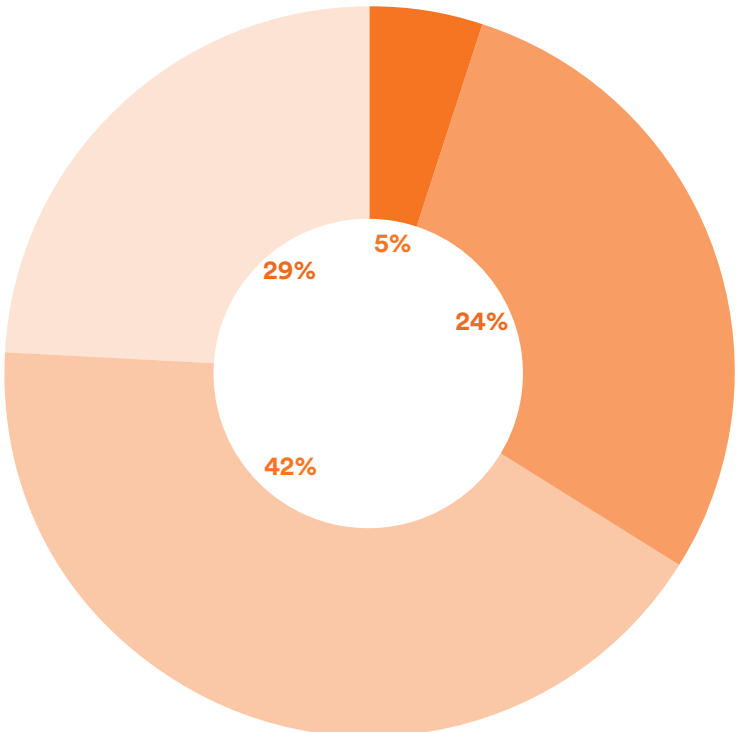
- Whilst overall 42% of domestic visits are VFR, this varies from 23% for Stratford-upon-Avon to 70% for Walsall. The Black Country tourism business is dominated by VFR, 60% for the LEP as a whole
- 52% of international visitors to Birmingham are travelling on business, compared to 32% of international visitors to Solihull
- 14% of international visits to Coventry are there for leisure, compared to 54% for Stratford-upon-Avon.

This level of variation highlights the lack of consistency across the region. This variation means that the strategy needs to be a framework that can be locally dialled up or down as appropriate.

In Coventry for example, the opportunity through City of Culture is to improve on the number and percentage of international leisure visits.

For the areas of the Black Country, as evidenced by the Black Country Living Museum, the ambition for BCLM, is to continue to develop visits from a 90 minute drivetime.

UK Domestic



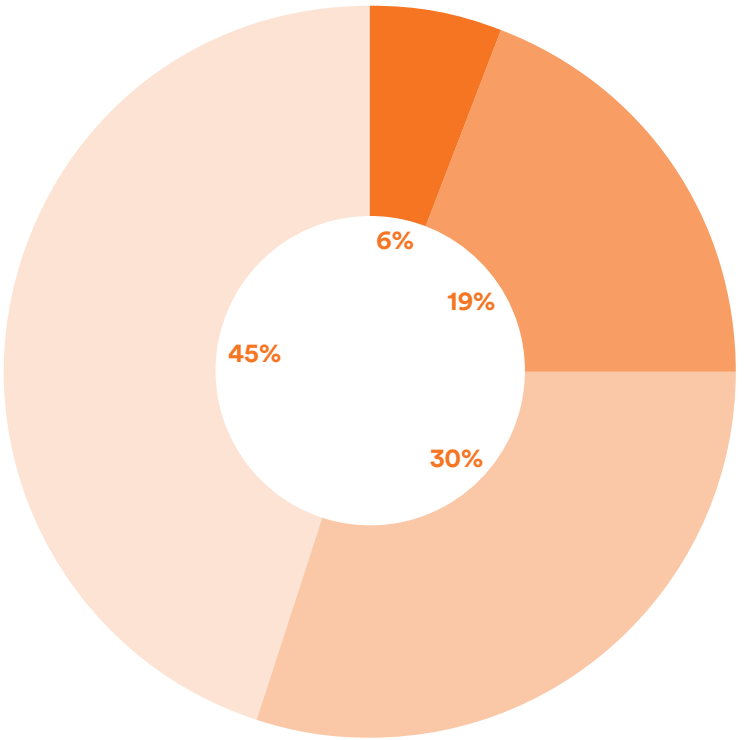
Business

VFR

Holiday

Other

International



Business tourism is the largest volume market. The regional business offer is strong with established venues such as the NEC targeting the international opportunity and new venues such as the Ricoh Arena focusing on growing the domestic market across a range of events.

Target Markets

Domestic vs International

Multiple data sources provide an understanding of the current tourism market size, structure and dynamics. These include:

- International Passenger Survey (IPS) - inbound
- GB Tourism Survey (GBTS) – overnight domestic
- GB Day Visit Survey (GBDVS) – domestic day

Current regional focus is on attracting UK visitors. The region will generate greater economic benefit from tourism through conversion of day to overnight visits.

International visitors are of far higher value than UK visitors. Increasing the numbers of international visitors is a key recommendation of this strategy.

Stakeholder workshops identified limited focus on attracting international visitors to the region. The two future major events provide the region with an ideal platform to alter this, and leverage each event to raise international profile and grow international visitor numbers.

Average spend per head in the region by category of visitor

Day visitors	£38
UK overnight visitors	£156
Overseas visitors	£341

UK Domestic

Day visits

86 million visits per year

Value £3,280m per year

Overnight visits

5.5 million visits per year

Value £860m per year

International

1.9 million visits per year

Value £648m per year

UK Customer Segments

For the UK market, the region should prioritise three top target markets*:

1st - Free and Easy Mini-Breakers – A younger, curious and energetic segment that fits well with the West Midlands youthful, diverse culture. Targeted for short-break options ,Coventry City of Culture and the Commonwealth Games.

2nd - Aspirational Family Fun – Affluent, targets for City of Culture and the Commonwealth Games and other sporting events . With children in tow, the many family-focused, established attractions in the region should appeal.

3rd - Country Loving Traditionalists – important segment currently and for the future. Targeted for countryside, county towns and villages, National Trust, English Heritage and Shakespeare's birthplace etc.

* Definitions drawn from www.visitbritain.org/visitor-segmentation

International Source Markets

Short-haul

France – a strong market, with established international connections to regional airports and growing at a faster rate than the rest of UK.

Germany – third most important international market to the region, but currently declining volumes and regionally a faster decline than the rest of UK. Priority market for inward investment activity.

Ireland - largest international market to the region and growing faster regionally than across the UK. VFR is 44% of the volume and therefore lessor economic value per visitor, but important for 32% leisure tourism value.

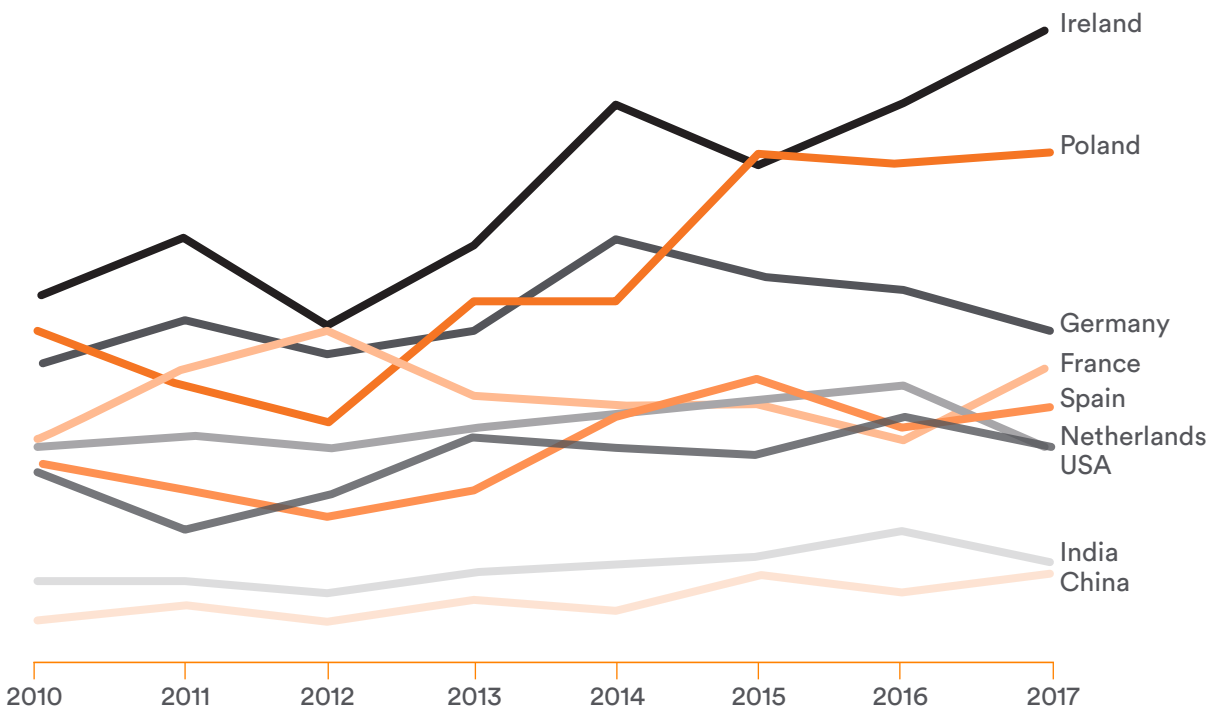
Poland – large, but stagnated volume, made up almost entirely of business travel (86%) and at threat post-Brexit.

Long-haul

China – another country with considerable growth potential and VisitBritain focus - the region should aim to at least maintain its current 5% share if not increase it tying in with inward investment and other activity.

India – huge growth potential given its outbound travel volume growth. It remains an important target given both strong regional VFR and business connections.

USA - regionally showing some volume decline against an overall UK growth, in part as a result of the loss of direct flights to BHX. An important market to maintain. Key to develop a direct route to aide Visitor growth.



* Based on the following towns/cities (excludes regional unspecified): Birmingham, Coventry, Wolverhampton, Dudley, Solihull, Stratford-upon-Avon, Lichfield, Tamworth, East Staffordshire, Rugby, Nuneaton, Warwick, Leamington

International Target Markets

	Culture Buffs	Buzz Seekers	Adventurers	Sightseers
Market and age profile	25-54 China	18-34 Germany, India, N America, Australia	45+ Germany, Australia	55+ USA
Portrait	Care about the image they project Travel is a reward for hard work	Seek new experiences Action & excitement Pay for once-in-a-lifetime Trendsetters	Comfortable with who they are Outdoors in natural landscapes Seek out new experiences	Cities Creature of habit Sensible
Motivations	Local food and drink Famous / iconic places	Famous / iconic places Local food & drink Challenge / action-filled Hands on learning	Local food & drink Rural life & scenery Famous / iconic places Outdoor leisure pursuits History and heritage	Local food & drink Famous iconic places Experiencing city life
Travel information	Friends & family Travel in groups or families	Friends & family Trusted influencer Mobile natives Spontaneous	Friends & family Websites	Friends & family Website & travel agents Deal-seekers
Segmentation	Lifestyle travellers Cultural Adventurers	Young active explorers Lifestyle travellers	Mature Experience seekers Outdoor enthusiast	Conservative Retirees

The target segments for the region for the future are Culture Buffs, and Buzz Seekers, whilst maintaining current activity for Adventurers and Sightseers in Warwickshire to encourage incremental growth.

Opportunities & Challenges

This strategy is focused on increasing the volumes of staying visitors, whether they be from overseas or from the UK, on business or at leisure, on holiday or staying with friends or relatives.

Opportunities

The West Midlands has huge strengths in terms of its history, heritage, culture and communities. Within its boundaries is a rich collection of valuable destinations which vary from global icons such as Shakespeare and Warwick Castle, to a less well known but diverse and interesting heritage and cultural offer. A young population contribute a further layer of eclectic product and all sorts of audiences are attracted by a real strength in sport and numerous family-oriented visitor attractions. The business tourism offer is highly developed and offers a full range of product to suit all types of conferences, events and corporate users.

Challenges

While the product is well developed, the positioning and marketing of the region needs further work and that is the basis on which the strategic priorities have been developed.
As the research revealed in Appendix I, there is a lack of awareness and knowledge of the region internationally. In the UK lack of awareness is augmented by outdated/sometimes negative perceptions of it.

A Comparative View – Growth Companies – Manchester

- From the successful delivery of the Commonwealth Games and events such as Manchester International Festival, coupled with wider economic growth of the city region, the repositioning of Greater Manchester in the world's media has transformed its image.

- Brand development work for Manchester started post-Commonwealth Games in 2002. It lead to the development of the signifier (M) used by the partnership of city region agencies when working in partnership. The brand approach is now used by Marketing Manchester as their business to business purpose – 'Inspiring visitors, investors & businesses across the globe to share in their original modern city'.

- The Growth Company brings together a number of Greater Manchester agencies and delivery organisations under one umbrella. Established in 1989 (and renamed as the GM Growth Company ten years ago), the Growth Company includes over 40 different delivery agencies.

- Greater Manchester demonstrates strategic alignment behind a shared vision driving and leading to effective delivery partnerships across its 10 districts and across the wider North of England.

Immediate Opportunities

2019-2021

Channel resources into delivering support to the major events, using highly collaborative and purposeful partnerships

2021-2023

Make connections between the major events & the region's unsung tourism offer.
Deliver the major events and evaluate their impact

2023+

Use the evidence base and results to advocate for a strengthened delivery model and additional resources for WM tourism

More than any other single opportunity, the two major events coming to the region between 2021 and 2022 talk directly and credibly to all of the region's key strengths and messages of:

- Innovation and creativity
- Diversity, equality and inclusion
- Youthfulness
- Internationalism

They are already recognised by partners as being the significant game-changing moments for the region – and a once-in-a-generation opportunity to:

- Shift the dial in relation to West Midlands perceptions, awareness and visibility
- Deliver growth in both leisure and business/ event tourism
- Develop new approaches for partnership working across the region.

The local key delivery agencies in Coventry and Birmingham are working to deliver each event. The tourism strategy provides a framework to leverage these events for the wider benefit of the region.

These opportunities combine in a Vision that seeks to raise awareness, change perceptions and drive increased visitation.

The strategy has two high level goals - to increase the number of staying visitors and to encourage greater visitation by international visitors, particularly from 4 core markets: China, Germany, India and the USA.

Six detailed objectives set out how these goals can be realised with a mix of activities, which will be the responsibility of a wide range of partners drawn from across the region.

- Raise the visibility and awareness of the region to international markets
- Improve the image and the perceptions of the region to UK audiences
- Ensure greater awareness of the business tourism product
- Develop the leisure product using hero themes to attract visitors across the region
- Provide new jobs and skills for people living in the region
- Connect tourism activity with other regional programmes to maximise impact.

Cross-cutting themes expressed in the Local Industrial Strategy recognise tourism as a fast growing sector - connected to other regional strengths such as innovation, creative industries and events. A young and diverse population will help change outdated perceptions of a region, grow the tourism industry, and help improve productivity, skills and the creative application of digital technologies.

Create hero themes
to promote the diverse tourism offer

The tourism strategy should focus on the products and propositions that have the potential to activate and amplify the region's identity, driving international and domestic tourism through existing recognition. It is not about building new attractions – but about making much more of what is already there, an eclectic mix of heritage, sport, music, design, architecture, food & drink, experiences, fashion, festivals and people.

Internationally, icons need to have cut-through and reach to be compelling to the targeted audiences of Buzz Seekers and Culture Buffs :

- Birmingham – a leading international city with a commensurate cultural offer. A credible and exciting cultural destination with internationally recognised cultural brands. A youthful and diverse city full of creative and distinctive experiences and festivals - large and small, established and emerging.
- Shakespeare – the birthplace town of the world's most recognised and performed playwright, the RSC delivers one of the best Shakespeare experiences in the world, through its innovative, contemporary interpretations of Shakespeare, with world-class performers, directors, producers. Backed up with heritage authenticity.
- Peaky Blinders – the industrial heritage story amplified internationally through a syndicated television series, and activated through experiences at key locations in the Black Country and Greater Birmingham, such as BCLM, the waterways and the jewellery quarter.
- NEC – at the centre of a network of region-wide international and UK business conference and leisure events facilities, bringing together business, science, knowledge, leisure, sport and entertainment.

Supplementing the 'iconic' hooks, are potential clustered experiences and itineraries, which can be developed for both domestic and international markets. Packaged with compelling narratives, the region can deliver exciting and distinctive experiences for the target markets.

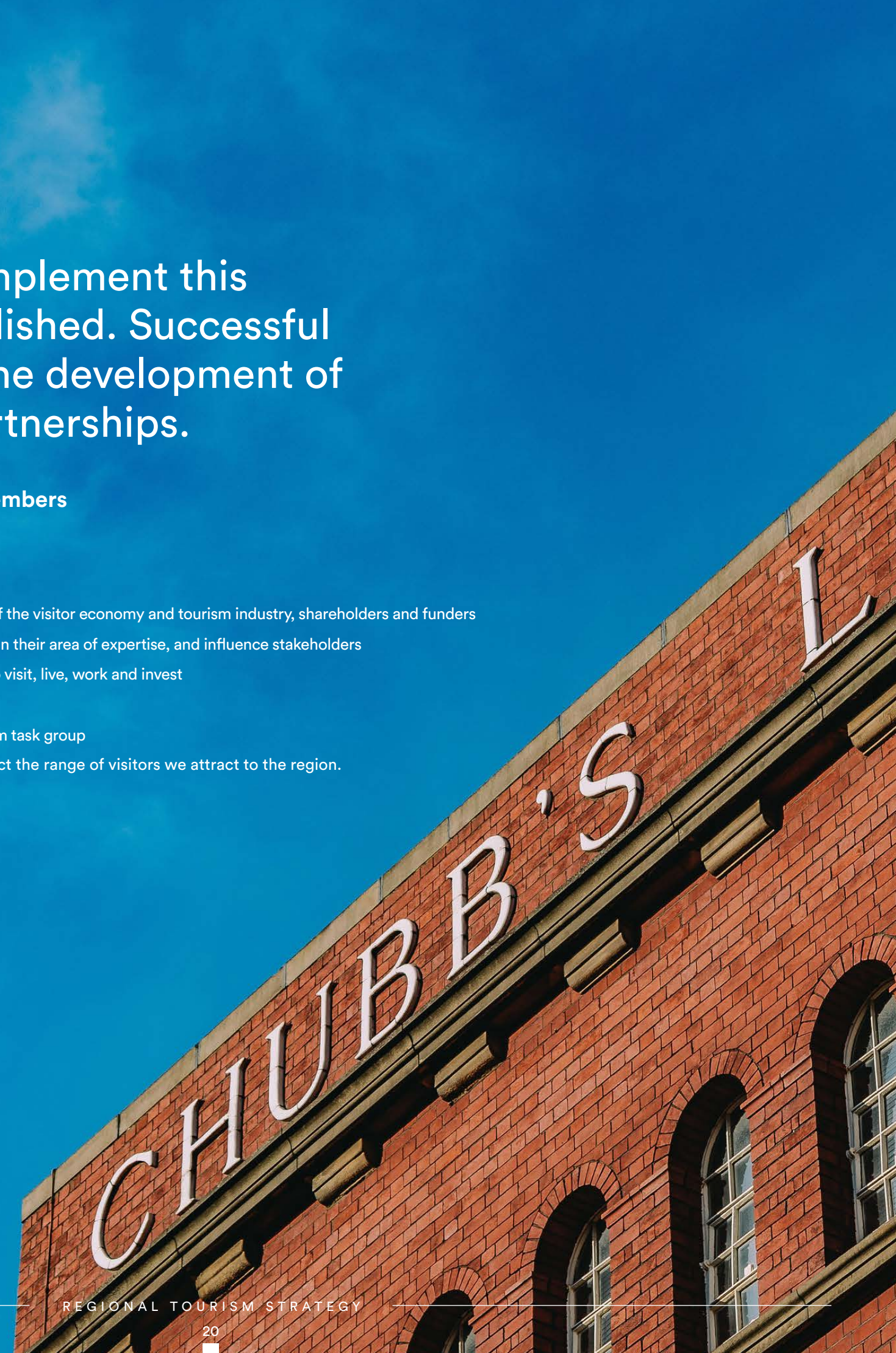
- Designer Maker: jewellery, glass, fashion, hats, leather, craft, food.
- Waterways & Gardens: reorienting the successful 'Discover England Fund' project towards a domestic leisure market.
- Iconic stories of British history told through impactful, artist-led immersive events, interventions and technologies - such as at Ironbridge, Coventry Cathedral, the National Trust and Warwick Castle.
- Sporting events: developing a bid pipeline on the back of the Commonwealth Games – capitalising on known brands like Edgbaston, Wasps, motor-racing and Rugby to bring more sports event to the region.
- Visual Arts: Birmingham, Wolverhampton Arts Corridor, Walsall, Compton Verney.
- Festivals and food – innovative festival programming and profiling on the back of City of Culture and Commonwealth Games.

Governance

A regional board to implement this strategy will be established. Successful delivery will require the development of new cross-cutting partnerships.

Criteria for Tourism Regional Board members

- The board will comprise 15 people
- Chaired by a leading tourism industry figure
- Members will be invited to apply to represent interests of the visitor economy and tourism industry, shareholders and funders
- Able to drive activity in line with the strategic objectives in their area of expertise, and influence stakeholders
- Champion the role that tourism plays in making places to visit, live, work and invest
- Membership will be reviewed annually
- Applications to be assessed by the WMGC Board Tourism task group
- Diversity in representation will be encouraged to reflect the range of visitors we attract to the region.



- Receives and advises on Regional Board: Tourism recommendations as part of Tourism update
- Decisions on major items of activity through business planning process

- Chaired by Tourism Figure, Vice Chair WMGC
- 13 industry and shareholder representatives
- Oversight of Regional Tourism Strategy delivery
- Supported by WMGC

- Oversight by Director WMGC
- Directed by Head of Tourism
- Updates to WMGC Board

- Triannual webinar to share progress on delivery with industry, DMO and local authority partners
- Annual Regional Tourism Awards Ceremony

Recommended Board formed by:

- Chair – Tourism Industry Private Sector Figure
- Vice Chair – WMGC (to support Chair/manage Board)
- Coventry City of Culture representative
- Commonwealth Games representative
- WMCA Local Authority representative
- Regional DMO - 1 x representative from range of DMOs across the region
- Tourism attraction – 1 x representative
- Hotelier – 1 x representative
- Conferencing Event / Venue – 1 x representative
- Sporting Venue – 1 x representative
- Cultural Organisation – 1 x representative
- LEP representative
- Travel trade operator / agent
- Festivals representative
- Birmingham Airport

Objectives

Regional Tourism Strategy Objectives:

- Raise the visibility and awareness of the region to international markets
- Improve the image and the perceptions of the Region to UK audiences
- Ensure greater awareness of the business tourism product
- Develop the leisure product using hero themes to attract visitors across the region
- Provide new jobs and skills for people living in the region
- Connect tourism activity with other regional programmes to maximise impact.

Delivery:

Based on the findings and recommendations of this strategy, the following objectives detail:

1. Short term actions for WMGC

Activity which will be delivered and evaluated by WMGC in their capacity as the WMCA Tourism lead, and through associated tourism projects and contracts.

2. Wider partnership actions

Relevant activity delivered by WMGC and / or partners across the region in the relevant sector, theme and target market segments.

It is by working through both elements above that the value of the tourism sector will be maximised. We will evidence the West Midlands' ability to work collectively, able to deliver a future Tourism Zone, contribute to the Tourism Sector Deal and win future major events.

Objective 1A - Make the region more visible to overseas markets*

Short term delivery by WMGC:

1. Commission a new narrative(s) & content

- Develop a regional narrative for use in communications
- Commission new video and photography to support communications activity and for third party use
- Reinforce a consistent look and feel to all marketing and communications

2. Continue to build stronger partnerships with Birmingham Airport & VisitBritain

- Work up concepts for marketing campaigns in the target core markets and support BHX with route development activity

3. Continue to build relationships with the travel trade

- Consider a Task & Finish group to target attendance at relevant travel trade shows and in partnership with DMOs and DMCs

4. Develop targeted communications activity in core international markets

- Use the major events to promote the wider destination offer in target markets through PR, social media and itineraries.

Wider partnership contributing activity:

1. Use the major events to:

- Drive visibility and support drawing on the destination brands with international cut- through (Birmingham, NEC for business; Shakespeare's England, Peaky Blinders).
- Make compelling connections to (and from) the developing tourism prospects connected to the City of Culture and Commonwealth Games and change perceptions and accepted narratives of the region as a credible international tourism destination for business and leisure.
- Adapt and develop the existing Ambassadors Programme to project the diversity, youthfulness and vibrancy of the region to all visitor markets.

2. Invest in marketing campaigns with GREAT and VisitBritain that provide the opportunity to re-position and re-present the region as part of a wider leisure or business offer.

3. Work in partnership to secure new direct airline routes, e.g. USA, GCC, India and China

4. Work with hotel investors, site owners and the planning authority to identify and attract the development of a 5 star hotel in central Birmingham.

5. Develop partnerships with the travel trade to increase the frequency of overnight stops in the region, combining out of region product such as Bicester Village with itineraries including Stratford, Warwick, Coventry and Birmingham.

The Importance of 5 stars

Some overseas markets, for example high spending customers from the Middle East and the USA, will demand the highest quality 5 star accommodation. While there are luxury country house hotels in the region there are no 5 star hotels in any of the urban centres. Central Birmingham would be the primary location as far these markets are concerned. The Lowry Hotel in Manchester is an example of the type of development missing and the regeneration of central Birmingham along with recent improvements in the retail and arts offer means that the time is right to fill this gap. The case should be made with more detailed analysis along with the identification of potential sites, owners, investors and operators that could be attracted to invest in the opportunity.

Direct Intercontinental Flights

Research with international meetings, incentive, conference and event organisers shows that direct access to their chosen destination and venue is a key decision-making factor. Travel trade operators are more likely to feature destinations with direct routes. The region will work with Birmingham Airport to support existing routes and win new short and long haul opportunities.

* Target core international markets for special focus include USA, Germany, India & China

Objective 1B - Support & leverage major events

Short term delivery by WMGC:

1. UK City of Culture 2021

- Work with VisitBritain and VisitEngland to promote Coventry City of Culture 2021
- Target national/international travel media with tailored destination messaging promoting icons and themes
- Create a toolkit for tourism partners to leverage benefits locally/regionally
- Develop destination itineraries for use by UK City of Culture, WMGC and third parties
- Fuller detail is outlined on page 26

2. Birmingham Commonwealth Games 2022

- Work with VisitBritain and VisitEngland to promote the Commonwealth Games to domestic and Commonwealth priority markets
- Work in partnership to promote the region's destination offer through all partner/stakeholder marketing communications
- Work across partners to develop a business case to national government to increase funding for international activity
- Fuller detail is outlined on page 27

3. Co-ordinate communications across the region, ensuring narrative is consistent

Wider partnership contributing activity Coventry City of Culture 2021 2021 opportunities:

1. Establish strong working relationships to identify partnership opportunities around marketing and communications
2. Explore new ways of consumer digital engagement as out lined in LIS
3. Discuss the potential for business extender stays in Coventry during 2021 (e.g. major event weekends)
4. Identify potential conferences and events to bid for during and after the event

Birmingham Commonwealth Games 2022:

1. Establish strong working relationships to identify partnership opportunities around marketing and communications
2. Identify regional itineraries/packages which can be promoted to extend impact of CWG visitors
3. Identify potential conference and sporting events to bid for post-Games
4. Identify opportunities to create innovative ways of digital engagement with potential visitors
5. Seek to develop bids to develop industry skills to widen impact of CWG

See overleaf for proposed activities by market: before, during and after the events.

A Comparative View – City of Culture Events – Derry / Londonderry

- Derry has a small DMO and tourism team (local authority) to service its leisure and business destination in budget, campaign and investment terms. They provide content to and receive core support from Tourism NI.
- Derry / Londonderry was the first UK city awarded the UK City of Culture designation in 2013.
- Immediate legacy opportunities were not fully realised due to local government reorganisation and other local issues but from 2016 onwards there has been a robust plan in place to encourage investment and coordinated planning connecting into economic development programme such as the waterfront redevelopment.
- Legacy events and programme investment / development to date includes: Landscape Alive project; Slow Food Festival; Halloween; 400th Anniversary; Jazz Festival; and the Walking Festival.

THE GAMES FOR
EVERYONE

Coventry City of Culture 20211
Ideas for development and review

Segment	Overall Strategy	Before	During	After
Culturally Curious International Visitors & Buzzseekers	• Integrate CoC into wider WM messaging • Work with CoC to identify partnership working opportunities.	• Create itineraries to position CoC within wider WM offer • Set up travel trade & travel media familiarisation visits • Work with CoC to create bookable product and test with international travel trade • Create new content using Coventry leisure ambassadors • Liaison with national/ international agencies, e.g. VisitEngland, VisitBritain.	• Support seasonal promotions during the year • Deliver a strong brand experience • Offer immediate, short 'taster' trips and add-on packages • Build leisure contacts database • Magnify messaging through WMGC & partner channels.	• Bid for appropriate culture/ creative industries events for Coventry (if not secured for 2021) • Use CoC evaluation findings in marketing communications • Enrol in CRM programme.
Discerning International Business Visitors	• Package and sell WM as a leisure extender trip around key milestone events • Raise awareness of WM as a business proposition for MICE market & investors • Identify culture/creative industries events bidding opportunities.	• Position and promote post-events extender trips • Invite to events and add other relevant business engagement options by sector • Engage international business media • Promote WM offer at relevant events outside region (e.g. International Festival for Business, Liverpool).	• Distribute CoC information provided to business delegates • Network/meetings with WMGC & other representatives • Deliver a strong brand experience • Build leisure contacts database • Collect data on business tourism/ investment interests.	• Follow up communications from WMGC representatives • Enrol in business CRM programme • Develop leads and opportunities.
International Youth, Education & Students	• Build awareness of the region at grassroots level, for both travel and learning • Work with the universities to identify partnership opportunities.	• Work with universities to create new narrative and messaging • Identify opportunities to magnify messaging in target markets • Target potential events to bring to the region • Arrange engagement opportunities with universities.	• Deliver a strong brand experience • Support the promotion of university and CoC engagement programmes.	• Enrol in CRM programme • Continue with targeted communications.
UK Residents	• Use CoC to raise profile of WM as a cultural destination.	• Support CoC in wider tourism messaging • Facilitate 'package' itineraries to promote through partner channels • Distribute toolkit to tourism partners.	• Support the seasonal promotions during the year • Deliver a strong brand experience • Collect and build leisure contacts database.	• Follow up campaign activity in target markets • Regular PR activity with travel media • Distribution of content to partners • Share legacy stories and messaging.

Birmingham Commonwealth Games 2022
Ideas for development and review

Segment	Overall Strategy	Before	During	After
Sports Tourists, Buzzseekers and Culturally Curious International Visitors	• Integrate CWG into wider WM messaging • Work with CWG to identify partnership opportunities.	• Create itineraries to position CWG within wider WM offer • Set up travel trade & travel media familiarisation visits • Work with CWG to include leisure itineraries in ticketing information • Work with CWG to create Birmingham/WM specific content with leisure ambassadors • Liaison with national/ international agencies, e.g. VisitEngland, VisitBritain.	• Deliver a strong brand experience • Provide itinerary information at visitor gateway points • Support non-accredited media with relevant information • Support relevant visits, e.g. VisitBritain.	• Continue with targeted communications • Enrol in CRM programme • Include CWG evaluation messaging in comms.
Discerning International Business Visitors	• Work with CWG & travel trade to develop extender packages • Work with partners to identify sports & sports related conferences and events to bid • Raise awareness of WM as a business proposition for MICE market & investors.	• Work with partners to set up appropriate CW business networks and events • Invite to events and add other relevant business engagement options by sector • Engage international business media.	• Deliver programme of CW business events in partnership • Network/meetings with WMGC & other representatives • Deliver a strong brand experience • Collect data on business tourism/ investment interests.	• Follow up communications from WMGC representatives • Enrol in business CRM programme • Develop leads and opportunities.
International Youth, Education & Students	• Work in partnership with appropriate agencies, universities to identify opportunities • Magnify messaging around existing and planned CWG programmes, e.g. vols, youth engagement.	• Support existing programmes and include in relevant campaign activity • Identify potential event opportunities to bid for.	• Deliver a strong brand experience • Support partner programmes through distribution of messaging.	• Continue with targeted communications.
UK Residents	• Use CWG to raise profile of WM as a cultural, sporting and leisure destination.	• Support CWG in wider tourism messaging in target markets • Work with travel media to promote region • Support CWG with promoting opportunities to local tourism businesses.	• Deliver a strong brand experience • Collect and build leisure contacts database. • Provide destination information at visitor gateways.	• Follow up campaign activity in target markets • Regular PR activity with travel media • Distribution of content to partners • Share legacy stories and messaging.

Objective 2 - Improve the image & perceptions of the West Midlands for UK residents

Short term delivery by WMGC:

1. Deliver familiarisation visits for travel media

- Work with partners to set up familiarisation visits for social media influencers and national travel journalists
- Work with appropriate regional ambassadors to support communications activity and project a contemporary, vibrant place, people and image
- Test out new bookable product & itineraries.

2. Develop targeted online social media campaigns

- Set up trackable campaigns in the build up to and around major events and test on different platforms for different target markets.

Wider partnership contributing activity

1. Using the major events as a springboard :

- Adapt the content developed for international markets to interest and entice the UK market
- Identify and work with key partners to build awareness and reputation.

2. Audit and leverage significant anniversaries, and support the development of related bookable product and itineraries.

3. Build on the Discover England Fund's waterways project and adapt for UK markets.

4. Further exploit the region's industrial heritage in a contemporary way using themes such as Peaky Blinders.

5. Broker marketing-led partnerships with clusters of high profile visitor attractions and hotels to test the feasibility of converting day visitors to staying visitors.

6. Continue to support the development of bookable products / experiences for distribution via the national TXGB platform. Ensure that current SME training schemes offered by DMOs includes an emphasis on:

- Working with the travel trade;
- Helping businesses to increase their on-line booking capabilities; and
- Working with the Indian and Chinese markets.

Comparative View – City Regions – Glasgow

- The Glasgow City Region is one of the largest city regions in the UK.
- The 2014 Commonwealth Games led to a wholesale rethinking of tourism strategy and delivery structures which went fully live in 2018. Glasgow has developed a delivery model that engages the private sector as well as the city-region.
- The city-region strategy aligns the individual strategies of the member authorities in a model involving a high-level portfolio group which meets four times a year.
- The new Leadership Group is responsible for championing the implementation of the plan, drawn from leading industry figures and academia, together with senior public sector stakeholders including the three lead partners Glasgow Life, VisitScotland and Scottish Enterprise.
- Delivery is undertaken in partnership via a number of thematic workstreams: Destination Marketing Network; Cultural Tourism; Data and Insights; Investment; Events; Business Tourism; Jobs & Skills; Destination Development.

Objective 3 - Raise awareness of the strength in business tourism

Short term delivery by WMGC:

1. Invest in a Regional Bidding Partnership Unit

- Establish working protocols with relevant business tourism partners across the region
- Establish working protocols with relevant partners/UK Sport to plan a bidding pipeline for sporting events
- Research and identify opportunities to bid for sector specific conferences, and sporting events
- Secure partner support for major bids
- Work to attract conferences/events across the region, tying into local Place Marketing strategies.

2. Advocacy for business tourism

- Work with LEPs to maintain an up to date understanding of its impact
- Assess and improve the quality and consistency of messaging in relation to the business tourism offer in destination conference bureaux
- Use data and case studies to promote the strength of the business tourism offer through B2B & B2C channels
- Advocate for the sector more forcefully, reinforcing the importance of business tourism in relation to attracting inward investment.

Wider partnership contributing activity

1. Work with the sports bodies and regional partners to bid for regular national and international sports events
2. Develop a Regional Ambassadors Programme, to include key industry figures from universities, industry and business and draw up an action plan that involves them in the promotion of the region
3. Clarify and agree the roles of destination conference bureaux and universities, and strengthen relationships with the NEC and other venues, conferencing departments and destination conference bureaux
4. Establish partnerships with Meetings, Incentives, Conference and Events trade organisers as well as major local businesses to grow domestic and international conventions and exhibitions business
5. Present and package existing or developing business clusters – e.g. automotive, gaming, sports etc. and develop events around these themes.

A Comparative View – Growth Companies – Lyon

- ONLYLYON is both a brand and an international marketing programme created by institutional partners and financial actors across Lyon Métropole (city of Lyon and its metropolitan area).
- ONLYLYON team of 8 staff is positioned within ADERLY (Lyon Area Economic Development Agency), one of its 13 founding partners which also include among others, the Tourism Office and Convention Bureau and LAs.
- ONLYLYON has a budget of just under €2m, most of which comes from public funding via the LA. Partners and the area's Chamber of Commerce and Industry also contribute.
- ONLYLYON uses Tourism as one of the key strands (as well as Business / Investment and Studying) to promote and build the international reputation of Lyon Métropole.
- ONLYLYON's activities include PR and communications, ambassador network, digital strategy and events. It operates the Skyroom, a unique prestigious and innovative hosting space in the city for international promotion.

Objective 4 - Develop the leisure product, enhance sales & distribution

Short term delivery by WMGC:

1. Create a series of itineraries for leisure tourism markets

- Identify themes, anniversaries, stories to create distinctive compelling hooks for itineraries
- Commission writers to create itineraries that focus on culture, heritage, sport including major icons, e.g. Shakespeare, Peaky Blinders, cricket etc.

2. Create a media bank of content

- As well as new content such as video, photography, include quality maps, itineraries, facts & figures and relevant tools that can be shared with all tourism partners.

3. Develop targeted communications activity for domestic markets

- Use the major events to promote the wider destination offer in target markets through PR, social media and itineraries.

4. WMGC to lead regional bids into national funds from VisitBritain, Tourism Zones etc

- Work collaboratively across the region on bids into national funds, to generate more funds to support tourism.

Wider partnership contributing activity

1. Product development to be led by the private sector and local authorities. WMGC can support where requested, but role is not to lead.
2. Establish partner marketing groups to reveal the numerous hidden assets and themes, making a revitalised offer more understandable, accessible and motivational.
3. Ensure culture, vitality and diversity is positioned front and centre in all Strategic Communications across a range of partners.
4. Collaboration amongst sports venues to further develop sports tourism marketing to extend length of stay and convert day to stay, by including other leisure opportunities.
5. Encourage public / private sector partnerships to develop new and existing leisure product and experiences. Support such industry-led groups in the development of related itineraries to encourage overnight stays and regional dispersal.
6. Support bids to VisitEngland's Discover England Fund, and sector deal funding, both when announced in support of these partnerships.

A Comparative View – City Regions – Munich

- Munich is actively repositioning using arts, contemporary culture, food and drink, and a vibe-y after-hours scene. 'Simply Munich' positions the city and embodies the way Munich presents its offer in terms of 'the culture of enjoyment' and 'the enjoyment of culture'.
- The strategy for developing tourism is the responsibility of the Tourismuskommission München, a joint undertaking between the city council and the tourism industry. They focus on using contemporary culture to shift the image towards a more dynamic, 21st century city.
- Munich has a strong business tourism offer with continuing investment in the product, allied to a strong cultural-heritage leisure offer with a diverse seasonal calendar of events. The collective cultural offer is stronger than any individual brands.
- It has a strong focus on attracting out of season business and sustainable growth tied to the brand.
- It demonstrates strong public/private partnership with a high level of private sector involvement. The MD of BMW is the Chairman of the Board.

Objective 5 - Provide jobs & skills for people living in the region

Short term delivery by WMGC:

1. Advocate for tourism jobs and skills development in the region

- Draw partners from government, universities and industry together and facilitate the establishment of a robust bid for funding to support an integrated skills programme, as part of the Local Industrial Strategy, to tackle skills gaps in the region.

2. Help promote the opportunities for event volunteers

- In preparation for the City of Culture and Commonwealth Games, and working closely with the event partners, support a hospitality-focused frontline welcome for visitors.

Context

Tourism provides both entry level and exit level roles – it is a truly inclusive industry.

Future industry challenges are being highlighted in the Tourism Sector Deal and robust regional action will also need to be taken to ensure that the industry can grow successfully.

This strategy foresees growth of £1.13billion in visitor spending over the next 10 years and it is estimated that this will create almost 19,000 additional jobs, a 9% increase. This does not include normal turnover which can be higher than industry norms.
A regional programme to address this challenge, and make tourism and hospitality a first choice career, is an important component of this strategy.

It should target the hard to reach groups with lower skills levels that have been identified in the region's industrial strategy. Many of these individuals can be beneficiaries of a growing and successful tourism industry. It is envisaged that the WMCA Skills Board and LEPs would lead this programme, supported by WMGC.

Wider partnership contributing activity

Work in partnership to position the region as a leader in the field of tourism training and skills development.

1. Develop an integrated skills programme owned and delivered by WMCA Skills Board and colleges, with the support and agreement of industry, UK Hospitality, Springboard, the Careers & Enterprise Co. and other partners.
2. Encourage greater numbers into tourism and related industries using this long-term programme to promote, train and enable employment across the sector to include BAME, hard to reach, returners and other groups.
3. Develop this programme as part of a wider WM tourism sector-deal proposal and funding.
4. Become a leader in the field by preparing for T-level provision in tourism related subjects.
5. Shift perceptions by industry / college partnerships to increase the volume of apprentices and move people up the value chain.

Objective 6 - Make the case for tourism to support wider priorities

Short term delivery by WMGC:

1. Delivering this strategy

- Establish a region-wide board to oversee the delivery of this strategy together with any specific task and finish groups – such as one for the Bidding Unit / skills
- Examine the best options for involving and updating industry partners and set up new B2B communications channels
- Roll out a regional awards scheme to tie in with the national scheme run by VisitEngland and hold a regular conference.

2. Advocate for the sector with public bodies

- Use data and case studies to advocate the case for tourism investment in the region with B2B partners, local and national government departments, agencies and through regional and national media
- Promote the changes to the region that have already transformed the visitor experience such as Grand Central, and those to come, such as the WM metro extension programme.

Wider partnership contributing activity:

This strategy provides a framework for tourism partners and others to be the voice for tourism and the visitor economy in the region – its impacts, importance and connections to transport, innovation, skills, digital and business more generally.

1. Existing strategies such as Midlands Connect will deliver the required transport solutions over the longer-term. The tourism case needs to be included as part of these strategies, both to take the sector's specific requirements into account and to support these wider regional priorities.
2. Build the evidence base and the case to support future funding opportunities (once confirmed) including proposals for the CWG, Tourism Action Zone and Discover England Fund Round 2.
3. In due course, and on the basis of clear evidence, make the case for greater resources for tourism to address the current inequality in terms of financial support that is evident when comparing the region with similar competitor city/regions in the UK and abroad.

The Local Industrial Strategy:

The Local Industrial Strategy recognises tourism as a fast growing sector - connected to other regional strengths - the creative sector, culture, and sports.

- A young and diverse population will help grow an industry which can be an exemplar to improving productivity, skills and apply digital technologies.
- This tourism strategy will be the template where the visitor economy becomes a modern, valued and contemporary industry in terms of:
  - New communication and promotional platforms to leverage Coventry City of Culture and the Commonwealth Games
  - Connections and partnerships with cultural and creative sectors, boosting awareness of the place and its destinations
- Maximising inclusive growth opportunities through new and progressive skills pathways
- Making connections to the use of augmented reality, AI and other digital applications to encourage new visits and extended stays.

The Local Industrial Strategy recognises tourism as a fast growing sector - connected to other regional strengths - the creative sector, culture, and sports.

Measuring Progress

The goal for the region as a whole will be to grow the value of tourism spend, adding more than £1.1 billion (9%) to the regional economy over the 10 year period (in real terms).

Whilst focusing on core strategic aims to grow international and domestic overnight stays, delivery will also support the important 'visiting friends & relatives', day visit and student markets. These will continue to be monitored.

Targets & Rationale

The principal strategic goal is to increase the spending by staying tourists, whether they are from overseas or the UK.

The table below outlines headline goals for regional tourism spend after 10 years.

STEAM estimates £12.6bn of total spend in the WMCA region in 2018. This has been translated in the table into spend for different market groups, defined by domestic and overseas and by purpose (using GBTS/IPS ratios). Different 10 year growth rates have been applied to these market groups on the basis of likely growth.

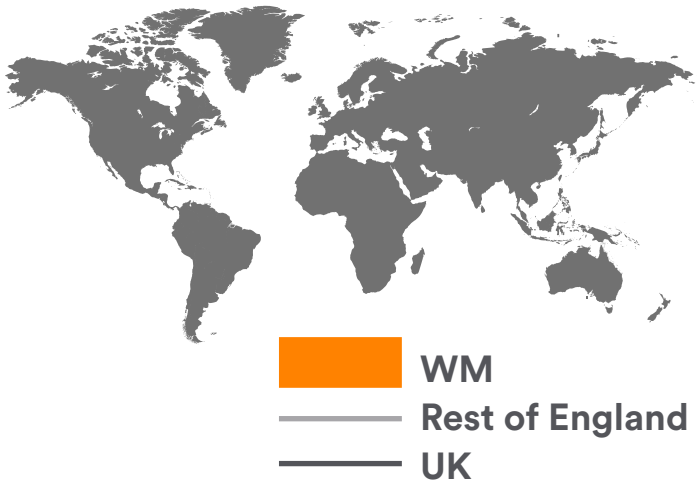
These rates are based on both historical growth rates and growth **aspiration** based on the impact of the interventions set out in this strategy.

Over the last decade domestic day visits in the UK have been relatively static. A modest growth rate (of 0.5% per annum) has been assumed.

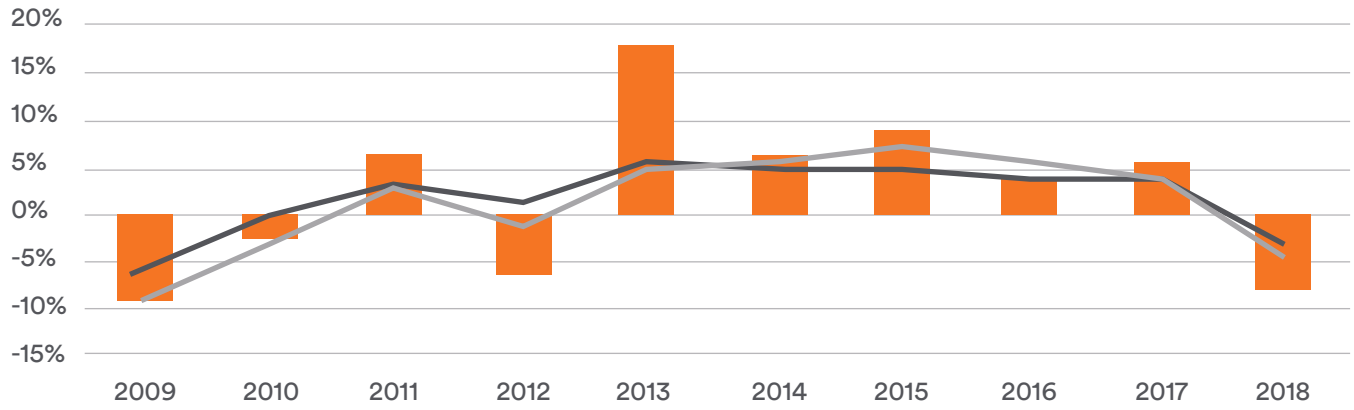
Domestic overnight levels have also been relatively static although leisure visits have increased modestly. The aspirational growth rates for domestic leisure and business are above the base growth rate to reflect the potential of interventions in these sectors.

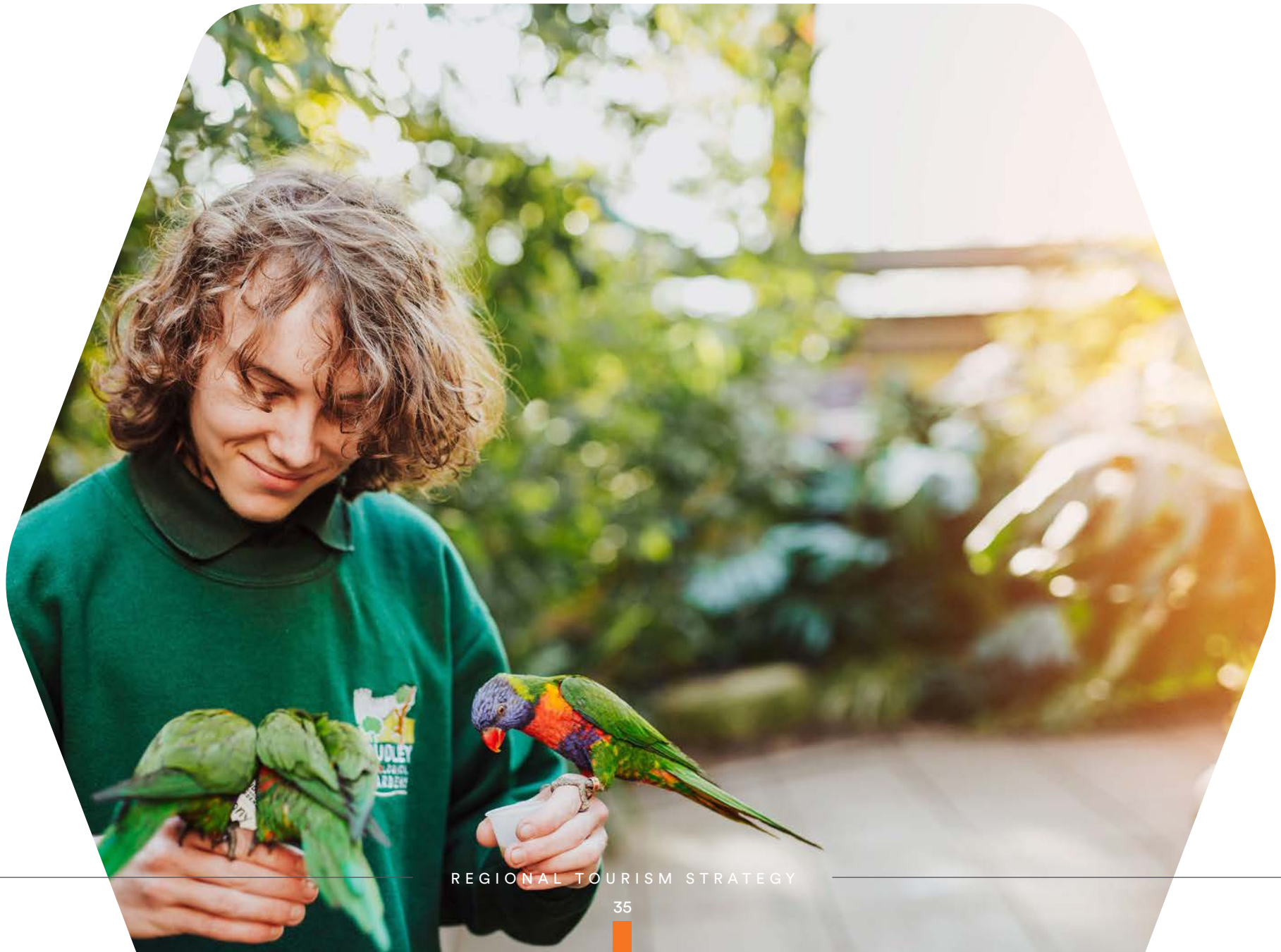
While overseas visits to the UK have experienced the highest growth rates in recent years, Brexit issues and other global headwinds are combining to create a more challenging market environment – with a 3% decline in international tourist numbers UK-wide and an 8% decline in the region in 2018. Again, aspirational growth rates are above the base growth rate to reflect the potential of planned interventions.

	2018 Total spend (£m)	Target ten year total spend (£m)	Growth target in total spend	
			£m	%
Domestic overnight	**1,805**	**2,021**	**216.6**	**12%**
Leisure	643	791	147.89	23%
Business	625	675	50	8%
VFR	536	562	26.8	5%
International overnight	**1,350**	**1,782**	**431.24**	**32%**
Leisure	333	449	116.55	35%
Business	457	626	169.09	37%
VFR	560	706	145.6	26%
Domestic day	**9,406**	**9,877**	**470.3**	**5%**
Total	**12,560**	**13,690**	**1,130**	**9%**



Number of overseas visits year-on-year growth 2009–2018





Regional Tourism Strategy

2019 – 2029

WEST MIDLANDS

WEST MIDLANDS GROWTH COMPANY IN COLLABORATION WITH TEAM, XVINSIGHT & CREATIVE TOURIST.