A DESTINATION MANAGEMENT PLAN
& PARTNERSHIP 2017- 2020
for
RUGBY BOROUGH COUNCIL
and PARTNERS

FINAL FULL PLAN

July 2017

A Meredith Associates

with

Roundberry Projects **The Research Solution**

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Introduction

Centrally located and well connected by motorway, railway and canal, Warwickshire's borough of Rugby is home to the birthplace of the sport of rugby, and has the busiest canal lock and stretch of waterway in the country. This **Destination Management Plan** takes an approach to managing tourism and the visitor economy across the area of Rugby, both urban and rural. It recognises the 'fuzzy boundaries' that consumers relate to the visitor destination, as visitors do not define their experiences by local authority borders.

Destination Management follows the national tourism agency Visit England's guidance, as a process of leading, influencing and coordinating the management of all the aspects of a destination that contribute to a visitor's experience, taking account of the needs of visitors, local residents, businesses and the environment. A Destination Management Plan is a shared statement of intent to manage a destination, articulating the roles of the different stakeholders and identifying clear actions that they will take.

The first Rugby Destination Management Plan spans 2017/18 through to 2019/20, enabling it to fit the Rugby Borough Council timeframes for both its Corporate Strategy and Town Centre Action Plan. This Destination Management Plan sets the direction for tourism growth across the Borough, seeking to:

- Retain and enhance the engagement and commitment of local businesses with Rugby Borough Council, Rugby First, Warwickshire County Council and other stakeholder organisations to enable them to work jointly to deliver the Plan
- Increase the value and volume of the visitor economy in Rugby town centre and across the borough through targeted actions
- Set out opportunities for inward investments and individual businesses to enhance the tourism product and profile across the borough
- Highlight priorities for public sector investment, connecting with existing initiatives and funding programmes
- Connect to other relevant strategies and action plans which can deliver elements of the tourism priorities.

Vision

Rugby will be recognised as a distinctive heritage town within Warwickshire, celebrated as the birthplace of the sport of rugby; attracting new visitors and their exploration of the borough's attractions and countryside, thus boosting the local economy.

Aim of the Destination Management Plan

To grow the local visitor economy by establishing strong partnerships between town and rural operators to deliver agreed actions, and working with neighbouring destination partners to deliver shared priorities.

Core Objectives

A number of Core Objectives set the context for the Plan to make tangible impacts over time. To**:**

1. Raise the profile and connected tourism offer of the Rugby area as a compelling place to visit
2. Increase economic benefits of tourism across the borough through resilient businesses and organisations
3. Strengthen delivery structures and the working relationship between organisations and businesses involved across the visitor economy
4. Support those involved in the visitor economy to be more familiar with the town and rural area products and visitor opportunities
5. Enhance the visitor experience, quality and connected infrastructure underpinning the tourism destination.

Strategic Themes

Four headline Strategic Themes focus efforts upon key areas of activity through a number of Priority Actions that can make an impact in the first three years:

A Building an Identity and Brand for Rugby as a whole Destination

B Developing Partnerships and Networks for Success

C Outward Facing Marketing

D Delivering a Quality Destination.

Within each of these four Strategic Themes there are 6 to 12 Priority Actions that are realistic and practical to be achieved over the three year Plan programme. The Actions are set out by level of High/ Medium/Low Priority, with a timescale, level of resource needed and lead and support partners to be involved. They cross reference to the Core Objectives and to the Warwickshire Visitor Economy Framework Key Priorities.

In addition, the key actions that should be taken forward with early 'quick wins' as initial priorities are set out. These have been selected as they are building blocks of successful delivery of the overall Plan and relate back to the first year/s High Priorities.

Overall:

The DM Plan will help **key market segments** to:	The DM Plan will help **local businesses and organisations** to:
• Hear about the area • Find their way around it • Visit for a variety of reasons • Enjoy its delights • Come back again, and • Tell their friends.	• Better understand who does what • Work together more effectively • Achieve more for limited budgets • Take an upbeat look into the future • Identify opportunities • Invest/ upskill / grow.

Context

A number of strategies and their implications for the borough have been analysed in producing this Plan, including Corporate and Town Centre strategies for Rugby; Tourism, Town Centre and Countryside plans for Warwickshire, and Rugby First's Town Centre plan. The key markets and priorities for neighbouring destinations have also been considered where there is mutual benefit.

New research undertaken to inform the Destination Management Plan shows the **Tourism Economic Impact Assessment** for Rugby Borough in 2015:

Trips:

- Total 2,273,000 trips to the borough by all types of visitors
- 2,100,000 as UK day trips and 172,000 overnight trips (average 3.6 nights stay)
- Comprising 136,000 UK overnight trips, and 36,000 from overseas – staying in all forms of accommodation types for 612,000 nights
- Approximately half the overnight trips are in paid commercial accommodation, and half with non-charging friends and family
- The key purpose of visit is driven by trips to visit friends and family, followed by leisure/ holiday and business

Spend:

- Total direct visitors' spend of £110 million - majority through day visits, £66.8 million
- Staying overnight spend of £32.8 million - so, although the number of overnight trips is much smaller than day visits, expenditure per head per visit is considerably more for overnight stays
- c.£10 million generated from maintenance on second homes, boats, static caravans etc and additional local household spending due to people coming to stay with them
- A second tier effect, the multiplier effect is seen from local businesses spending on wages, services, goods and supplies into the local and regional economy
- This original £110 million direct visitor spend generates an additional £20 million into the economy through indirect and induced spend
- **Total Tourism Value is £129.6 million into the Rugby borough economy**.

Employment:

- Supports 1,672 full time equivalent jobs (FTEs)
- 2,272 actual tourism related jobs (mix of part time, full time and seasonal posts)
- Tourism accounts for 5.2% of all employment in the borough, a little lower than the 5.9% share across Warwickshire as a whole.

On the whole the estimates for various aspects of tourism across Rugby borough indicate that **the borough accounts for between 12-16% of different measures of tourism in Warwickshire, or around one sixth to seventh share of the county's tourism economy**.

Delivery and Resourcing of the Action Plan

Ultimately, this Destination Management Plan and emerging destination partnership must integrate with other work from, as a minimum, the Rugby First (town centre focus) organisation, Coventry and Warwickshire Local Enterprise Partnership and Warwickshire County Council, as well as neighbouring Destination Management Organisations. Where practical, recommendations meet complementary agendas whereby all budgets can achieve better value.

The Action Plan takes a realistic approach to delivering Rugby's aspirations and potential in the context of continued constraints on public sector budgets and a largely unconnected tourism sector. It forms a working checklist of projects, activities and priorities for the partners to deliver against and monitor progress.

A number of linked and standalone actions within the 4 Strategic Themes will contribute to successful delivery of the DM Plan. Rugby Borough Council is identified as the lead agency on the majority of actions, however individual actions will be led by different officers and departments as indicated**.** The new Tourism and Town Centre Team Leader role will have the pivotal role in driving delivery of actions and building a renewed, strong relationship with tourism sector businesses and assisting co-ordination across the Council's tourism related functions. The Economic Investment Officer and Senior Visitor Services Assistants (the latter working from the Rugby Art Gallery & Museum/ Visitor Centre) should also be key in strengthening these relationships and will lead on specific actions. In effect this represents a dedicated core of tourism focused personnel, working to deliver the new Destination Management Plan.

The 'bigger picture' is to grow the overall volume of tourism connections and economic benefits by establishing a strong **Rugby Tourism Network** of businesses and stakeholders from across the area. Local tourism partnership development will take a phased step-by-step approach to build the Rugby Tourism Network in the early years, during this initial timescale 2017-2020. It will evolve a shared identity and common direction of travel.

Building on the recent years' work in regenerating and strengthening the town centre, the development of the Council led approach will focus on the tourism of the whole area, not just town centre. The heritage town and birthplace of the sport lie at the heart of the 'attack brand' and will be core to the approach to build the urban and rural partners.

- In order to demonstrate that the tourism industry has adopted and supported the DM Plan, the Rugby Tourism Network should become a private-sector/trade led tourism organisation supported by RBC, with a Chair that is non-political, nor from the public sector
- Whilst the Network is unlikely to hold executive powers at the outset, and has no budget to direct, it should positively seek to build awareness of and participation in the network and set the direction of tourism growth with the local industry and partners. The areas of activity will reflect the DM Plan Objectives and Strategic Themes
- It will act as a contributor, advisory board and trade voice to input towards the needs of the sector that are then reflected in the outputs of RBC through online, digital, printed guide and Visitor Centre information, attendance at tourism events, etc.

Stronger links will be developed by RBC Officers and the Tourism Network with Warwickshire County Council Tourism team, Countryside and Heritage Services, Highways, etc. The links with County's strengths in countryside, public rights of way, events, market towns, information, etc. and associated funding will be nurtured and strengthened.

Relationships between RBC visitor economy team will be developed with neighbouring Shakespeare's England, Visit Coventry & Warwickshire (Coventry City Council), as well as the local authorities of Nuneaton/ Bedworth, North Warwickshire, Hinckley & Bosworth, Harborough, Leicestershire, Daventry, Northamptonshire and Leicester Shire Promotions. Appropriate marketing, product development, packaging, funding bids and other opportunities will be pursued where they benefit the area of Rugby borough and its fuzzy boundaries, supporting tourism businesses and the local economy and communities.

Future Growth Forecast

Nationally, Visit England has set a target of 5% annual growth in tourism revenue between 2010 and 2020. On the basis that Rugby borough appears to be around 'average' in its share of tourism volume, value, and product within the county as a visitor destination, this is a fair target for Rugby to achieve. Thus a 5% year-on-year growth is considered an overall target for the borough, with specific localised performance, eg of key visitor attractions, that may surpass this individually.

At the end of the three year Destination Management Plan timespan, its overall progress should be evaluated against the Objectives, Themes and project Actions. This first Plan represents a phased approach, building the blocks for a more dynamic delivery of Rugby as a Visitor Destination. By then, a form of Tourism Network or more participative partnership will have bedded in, and then the situation should be reviewed as to renewed priorities for the future moving forwards.

SECTION 1 INTRODUCTION

1.1 Introduction

Centrally located and well connected by motorway, railway and canal, Warwickshire's borough of Rugby is home to the birthplace of the sport of rugby, and has the busiest canal lock and stretch of waterway in the country.

This **Destination Management Plan** (DM Plan) takes an approach to managing tourism and the visitor economy across the area of Rugby, both urban and rural; is about far more than just marketing. It recognises the 'fuzzy boundaries' that consumers relate to the visitor destination because people define destinations in ways that make sense to them and the nature of their visit**:** the geography, the welcome, the distinctiveness, key routes and connections, the ease of orientation, activities undertaken and the overall experience.

Visit England, the national tourism agency, notes how "Destination Management is a process of leading, influencing and coordinating the management of all the aspects of a destination that contribute to a visitor's experience, taking account of the needs of visitors, local residents, businesses and the environment.

A Destination Management Plan (DM Plan) is a shared statement of intent to manage a destination over a stated period of time, articulating the roles of the different stakeholders and identifying clear actions that they will take and the apportionment of resources."[1]

A Meredith Associates was commissioned in January 2017 to undertake a destination management assessment for the borough of Rugby, identifying projects and partnership opportunities to improve the area's visitor economy. Stimulus has come from Rugby Borough Council having invested in the World Rugby Hall of Fame attraction in the town centre and the increased support for tourism as a sector that can enhance the borough's economy and identity.

The Plan's key outputs are to recommend strategic priorities and objectives as part of the Destination Management Plan and also to recommend a delivery model for a borough wide Destination Management Partnership, identifying areas where members could share financial and non-financial resources.

There is strong potential to develop Rugby's visitor economy through greater collaboration and focus. In developing a Destination Management Plan, there is a strong role in supporting the broader visitor economy and taking an outward facing approach. Importantly, the destination is about more than just Rugby town centre; it includes not only the rural borough, but also the businesses situated on the edge of neighbouring authorities that serve Coventry, Warwick, Daventry, Nuneaton, Lutterworth, Hinckley and other locations.

These recommendations meet the challenge to create a practical and not too bureaucratic approach and consensus around the visitor economy with local partners from the public, private and third sectors and communities through a structured Destination Management Plan and Action Plan.

Identification of an appropriate form of a **Destination Management Partnership (DMP)** is key to making delivery and stronger collaborations a success. Whilst the Plan will particularly involve the leadership through the local authority of Rugby Borough Council, future improved visitor activity performance has to result from closer working with organisations and business deliverers, across urban and rural areas and with links to the settlements and partners beyond the borough boundary.

The DM Plan sets out a direction and recommendations for the Borough Council to consider and agree to implement these actions. There is flexibility as relationships and circumstances evolve on the ground and opportunities arise for the Plan to be used as part of a working toolkit alongside the broader development of tourism across the borough.

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[1] Visit England, Principles for Developing Destination Management Plans

1.2 Approach

This DM Plan brings together the latest intelligence, thinking and data, to create a firm route map for the next three years, 2017-20. The approach to developing the DM Plan has covered stages of desk review, product and marketing audits, one-to-one consultation, online business survey, trade workshop, etc. through engagement with a breadth of key stakeholders. These include business, community and elected organisations, attractions, retail and hospitality businesses, accommodation providers, experience suppliers, countryside managers, cultural groups, neighbouring destination management organisations in and around the county etc. This plan seeks to bind them together with a shared sense of direction for the long haul. Consultees are identified in Appendix A.

It is aimed at increasing the value and volume of visitor activity to the local economy as a whole through better encouragement and hosting of visitors, spending more, staying longer, through the beneficiaries working more effectively together.

Ultimately, this DM Plan and emerging destination partnership must integrate with other work from, as a minimum, the Rugby First (town centre focus) organisation, Coventry and Warwickshire Local Enterprise Partnership and Warwickshire County Council, as well as neighbouring Destination Management Organisations. Where practical, recommendations meet complementary agendas whereby all budgets can achieve better value.

The DM Plan will help **key market segments** to:	The DM Plan will help **local businesses and organisations** to:
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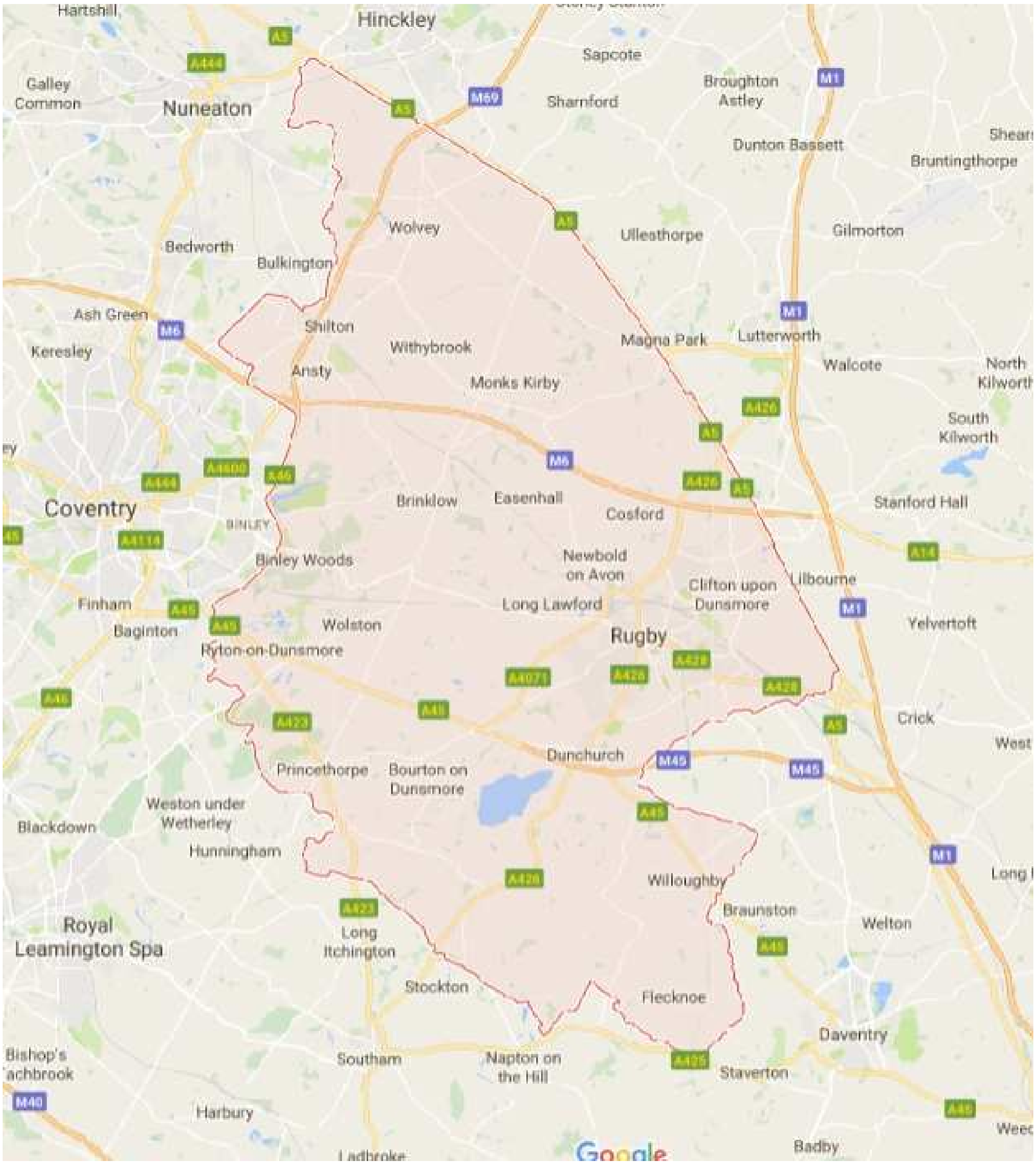
SECTION 2 STRATEGIC CONTEXT

2.1 Introduction

To develop a destination management plan that works it is vital to consider the destination in its wider spatial and economic context as well as for its tourism potential. In this chapter we outline the relevant evidence from a number of sources which inform the recommendations of this plan.

Rugby borough lies in the east of Warwickshire and borders both Northamptonshire and Leicestershire. It is a key gateway from the East Midlands to the West Midlands. The borough has a population of just over 100,000 people, with around two thirds of these living in Rugby town.

The map of Rugby Borough Council borders illustrates how the tourism area of influence is broader, with ‘blurred boundaries’ reaching out to rural areas around Crick, Lutterworth, Stockton, Napton, Braunston and beyond, whilst there are urban border areas with Hinckley, Nuneaton, Bedworth and Coventry.



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Since 2011 Rugby has seen significant population growth and this is set to continue with the period up to 2035 expected to bring 30% growth amounting to some 130,000 inhabitants[2]. The majority of population growth will be due to migration into the area through new, large, housing developments. The former Rugby radio masts site will become a substantial new urban extension over time, home to 6,000+ new households. This all indicates that a local population growth will generate more people to undertake leisure activities contributing to the local visitor economy, and draw in a greater volume of people coming to visit friends and family, exploring the area.

Rugby is a relatively prosperous borough with average household incomes being higher than those averages for the West Midlands region and higher than average educational qualification levels. The economy is based on manufacturing/engineering heritage with growth in service sectors. Geographically Rugby is well positioned in the centre of England, with direct, fast train services to Birmingham airport, London (just 50 minutes) and cities in the north. The M6, A5 and M45 run through the borough and the M1 is very close on the eastern side.

A number of strategies and their implications for the borough have been analysed in producing this Plan. The most relevant are briefly summarised here with a comprehensive analysis in Appendix B.

2.2 Rugby Corporate Strategy 2017 – 2020

The newly launched Corporate Strategy for the borough 'Proud of our Past, Fit for the Future' takes an optimistic outlook, setting out the Borough Council's priorities for the next five years. A key issue is to facilitate physical and economic growth, while protecting the essential characteristics that make the borough special to local people. Tourism, having been previously reduced in status as a factor for the Council, has become a notable attribute to the borough, and is now directly referenced as a growth opportunity. Within the **Growth and Investment Portfolio**, key Priorities relevant to developing the visitor destination are:

Promote sustainable growth and economic prosperity

- We will conserve and enhance the natural and built environment embracing Rugby's proud heritage and history

Promote and grow Rugby's visitor economy with our partners

- The long term potential is huge. Rugby has a long and proud heritage that is not widely enough known. A key aim of this strategy is for The Rugby Town to become internationally recognised as the birthplace of the game and… the town centre will become a regionally recognised cultural and visitor hub
- Open the World Rugby Hall of Fame visitor attraction
- Celebrate our cultural and artistic heritage through Rugby Art Gallery and Museum, The BENN Hall and events and festivals
- Support Rugby town centre as a visitor destination for leisure, retail and cultural activities.

2.3 Rugby Local Plan

The town has seen a number of recent retail developments, some in the town centre, and significantly the Elliott's Field Park on the edge of the town hosting major national brands. The green and clean environment is a source of pride to the local authority. There is much pride in the town being the birthplace and namesake of the game of rugby. This is recognised as a Unique Selling Point. No recent visitor strategy for the borough is in place, however 3 of the 9 spatial objectives in the Borough Council's Draft Local Plan[3] relate to the visitor economy:

[2] Rugby Borough Council Publication Draft Local Plan, September 2016
[3] Ibid

- Enhance the quality of outdoor and indoor sport, leisure, **recreation and cultural facilities** within the Borough
- To enhance the **vitality of Rugby Town Centre**, ensuring it has a complementary role to the out of town retail parks, providing a distinctive offer to both residents and visitors
- Build on Rugby's **rural market town character** by protecting, utilising and enhancing historic assets…, maintaining an attractive built environment throughout the Borough.

Policy ED4 of the Local Plan sets out a series of acceptable tourism-related developments outside the urban area relating to **Tourism and Leisure and Farm Diversification.**

2.4 Rugby Town Centre Action Plan 2016 – 2020, Rugby Borough Council

Like many town centres across the country, Rugby town centre has faced a number of challenges in recent years. In order to thrive, the town centre needs to change and adapt to meet these challenges. The Rugby Town Centre Action Plan supports the delivery of a town centre fit for the future. Many of the attributes reflect developing a healthy visitor destination – the strong independent retail sector, the wide range of food and drink outlets, and its cultural offer: Rugby School, Rugby Art Gallery and Museum, World Rugby Hall of Fame and the Rugby Football Museum.

There are five **main areas of focus** which form the basis of the action plan:

- Physical environment; Town centre uses; Marketing; Investment; The visitor economy.
- Amongst the actions is a task to **:** Establish a Destination Management Partnership (DMP).

2.5 Rugby First Business Plan, The Next Five Years 2015 – 2020

Rugby First operates a range of core services within the Business Improvement District -BID mandate, voted for by the majority of town centre businesses. The Rugby BID was the first in this region and one of the first in the country in 2005. In 2015 the mandate was again renewed for a third five year period; a direct response to local businesses' ideas to improve the trading environment, encourage footfall and enhance profitability. The core objectives have always been to make the town centre safer, cleaner and friendlier so that customers will come and businesses have the chance to prosper. Four core project areas are delivered:

- **Marketing, Promotions & Events;** Increasing footfall, spend and raising the profile of Rugby town centre. Marketing has most relevancy to the Destination Management Plan.
- **Town Rangers; CCTV; Cleaning Service.**

2.6 Warwickshire Visitor Economy Framework (VEF) 2013-18

Rugby is only directly referenced as an inclusive part of the "Gateways to the Countryside" rural and outdoor tourism product. This would contrast sharply with how Rugby is seen by those in Rugby which, in our view, is more as an attractive heritage town/retail destination. The town and borough are presented more as being subsumed into "north Warwickshire" which is essentially anywhere not in the more visited Stratford and Warwick districts, having the world renowned destinations of Stratford-upon-Avon/ Shakespeare and Warwick Castle. In considering tourism partnerships the VEF notes, "In north Warwickshire [including Rugby] collaborative tourism activity is minimal. Given the nature of the offer this is a pragmatic position".

There are **three Strategic Priorities** in achieving growth:

- Priority 1: **Creating Compelling Places to Visit**
- Priority 2: **Building Private Sector Marketing Capacity**
- Priority 3: **Extending the Benefits of Tourism**

These three priorities of the VEF were to be delivered through 6 action programmes, each of which has differing resonance with the Rugby area, product, markets, and needs. A pragmatic Destination Management Plan for Rugby will contribute towards framing how the visitor economy benefits local people, visitors, businesses and the environment.

2.7 Warwickshire County Council Tourism Policy, November 2012

The County Council's tourism policy sets out its role in delivery of the Visitor Economy Framework and how the visitor economy contributes to the Council's ambitions for economic growth and work/life balance. There are nine principles to the policy covering the role of Stratford-upon-Avon, Warwick and Royal Leamington Spa as attack brands to be marketed by an external body (Shakespeare's England) with development support from WCC officers. "Destination development plans (..) need to be market-led and commercially driven". Rugby is not mentioned and must be assumed to be part of the Gateways to the Countryside product.

2.8 Warwickshire Town Centres Strategy & Action Plan 2016-17

The Council sees that tourism is intrinsically linked to the prosperity and development of the towns in Warwickshire. The Strategy recalls that Rugby was the 2nd town in the UK to vote to establish a BID and has secured further terms. In looking to the future the WCC Town Centres team sees maintaining the vibrancy of town centres as a priority and will provide support and limited funds to support this. The Town Centres Team will continue to deliver a programme of support to help further improve economic growth in Warwickshire, with delivery under three main strands; Partnership, Infrastructure and Place-Making. The team will continue to lead the Warwickshire-wide Town Centres Forum as a public/private partnership. Opportunities for development include improving the visitor offer and working with stakeholders to maximise, and spread the benefits of tourism county-wide.

2.9 "The Knowledge Capital of the UK" Updated Strategic Economic Plan, Coventry & Warwickshire Local Economic Partnership (LEP), August 2016

Culture and Tourism was not featured in the 2015 Strategic Economic Plan, however this updated 2016 plan sees the sector recognised as a driver of growth being now one of the 5 pillars of activity. There is very little reference to Rugby borough – it's neither the best nor worst performing borough on most metrics. However, the Culture & Tourism section notes that Rugby has tourism potential which is not being filled.

Specifically for the visitor economy growth the focus is on this being delivered through Coventry's City of Culture 2021 bid and the Shakespeare's England offer. However, there will also be focus on ensuring that the benefits of an enhanced visitor economy are felt throughout Coventry & Warwickshire. Actions are to be delivered by; "Maintaining and growing our cultural and tourism assets is a key priority for CWLEP. To achieve this ambition, **there is a need to build on existing strengths within the sub-region, coupled with a need to better package and promote key visitor attractions across the full CWLEP area**. This would facilitate increases in overnight stays and therefore increases in visitor spend levels. Investment will focus on economic and cultural development." Funding for strands of tourism product development are available through the CWLEP ESIF strategy. Investment will focus on economic and cultural development, including:

- Innovative contemporary approaches in historic environments and joined-up public spaces
- Deliver an improved and integrated transport infrastructure to improve connectivity
- Training, skills development and cultural education
- Investment in digital infrastructure
- Enhancing the supply of accommodation to enable longer stays and increased visitor spending.

2.10 Destination Management Plan for Shakespeare's England Region 2015–2025, March 2015

Shakespeare's England is the Destination Management Organisation for Stratford and Warwick districts which sit on Rugby Council's south/western border. The DMO has been established with the support of both district councils and has a significant private sector membership financing its operation. The destination management plan provides the focus for the towns of Stratford, Warwick, Leamington Spa, which are recognised as Visit England attack brands, and their rural hinterlands. It also includes important businesses outside that area such as Birmingham airport, Bicester Village and links to the Cotswolds. The document does make reference to potential working with Rugby BID.

2.11 Coventry 2014 – 2024 An Emerging Vision for Tourism

This is an ambitious plan for the city which includes the aspiration to attract major conferences of 4000+ delegates. Coventry ranks 13th in destinations for business tourism, but is not in the top 20 for trips when all purposes are considered. Business tourism is therefore the lead target segment.

Coventry's marketing is branded as Visit Coventry & Warwickshire and this plan advocates the desire to "be seen as an equal 'partner' to Warwickshire's established rural offer, with a fully-fledged city DMO". The desire to **Change Perceptions of the city is the number one Objective** and the bid to be UK City of Culture in 2021 is a key step in this direction. Subsidiary actions are to **strengthen the Heritage and Culture offers**, become known as a sporting city and to engage with students and graduates at the local universities.

2.12 Nuneaton and Bedworth Destination Assessment, May 2016, The Tourism Company

The Destination Assessment highlights the opportunities around the bicentenary of the birth of George Eliot in 2019. Festivals and events are seen as the way to drive visitor numbers with the business tourism and VFR markets currently being strongest. The report recognises that the Borough's tourism offer can be strengthened by co-ordinating with neighbouring authorities and this is a possible opportunity for Rugby where literary tourism and canals might be possible joint themes. "Establish formal tourism links with adjoining local authorities. Nuneaton and Bedworth has much in common with North Warwickshire, Rugby, Hinckley & Bosworth, Coventry and Shakespeare's Country. There will be areas of mutual interest in terms of infrastructure development and wider promotion. NBBC, through NWTA, should explore potential links and areas of mutual interest/support."

2.13 North Warwickshire and Hinckley & Bosworth Destination Management Plan 2017-22, 2017 Draft, ACK Tourism

Produced around the same time as Rugby's DM Plan, this is the first DM Plan for the two collaborating local authorities of North Warwickshire and Hinckley & Bosworth. This will work across Warwickshire/ Leicestershire boundaries, backed by LEADER rural funding. The plan focuses on reducing duplication between small stretched local authorities and tourism associations, to increase co-ordination of effort. Product development priorities and key growth market opportunities are identified. The Plan anticipates working on clusters of attractions/localised destinations, with improved marketing and a tourism coordinator role.

It comprises 9 inter-related programmes of projects designed to address the identified priorities for achieving tourism growth in the two boroughs, and to support and accelerate projects that have already been worked up.

2.14 Midlands Engine Strategy, March 2017, Department for Communities and Local Government

The Government has recently published the Midlands Engine Strategy and Rugby sits at the heart of this region. £392 million will be invested across the Midlands through the Local Growth Fund. Of this £20 million is allocated to a Midlands Skills Challenge to help close the skills gap between the Midlands and the rest of the country. The visitor economy is loosely referred to in the chapter on Enhancing Quality of Life. An announcement of "£2 million to improve cultural infrastructure in Warwick, including through redeveloping and expanding the Warwick Arts Centre" was made. Aside from a handful of other tourism-related investments elsewhere this part of the strategy concentrates on cultural capital as a way of attracting skilled workers to the region.

2.15 Northamptonshire

Currently Northamptonshire does not have a Destination Management Plan/ visitor economy strategy. Recently tourism promotion had been carried out alongside an inward investment role by the Northamptonshire Economic Partnership but this was disbanded in 2016. Daventry District Council has recently held its first Tourism Forum meeting for local businesses and its plans to build the Daventry Canal Arm and boat lift are a strong part of its regeneration plans. A small private sector consortium is taking forward marketing activity, mainly geared around historic houses.

2.16 Leicestershire

Leicester Shire Promotions is the tourism organisation for Leicester and Leicestershire. The company works in partnership with Leicester City Council, Leicestershire County Council, Leicester and Leicestershire Enterprise Partnership, VisitEngland and the local tourism industry to deliver campaigns and services to attract more visitors to the city and county. Due to changing funding arrangements by the County and City Councils, the tourism support will be changing over the next two financial years.

Leicester and Leicestershire Enterprise Partnership (LLEP) Tourism and Hospitality Sector Growth Plan 2015 provides the overview of county tourism priorities. The Key Actions include:

- Investment programme to support key attractions to increase their capacity
- Secure more events and conferences
- Support rural businesses to diversify their offer into tourism and hospitality
- Work with Superfast Leicestershire to enable tourism businesses to gear up for superfast broadband
- The LLEP and partners will continue to support a regional tourism service and support hotel development.

There are actions above that will compete for visitors to Rugby, such as strengthening key visitor attractions (Twycross Zoo, Richard III). However, it could also be viewed that these will be drawing more people into the broader area – enabling the 'fuzzy borders' to benefit from this influx of new visitors to the area.

SECTION 3 MARKET INTELLIGENCE & PERFORMANCE

3.1 Range of Market Intelligence Sources

Following on from the context provided by the strategic overview, this chapter considers the range of statistics and various performance indicators that provide more insight into how the Rugby visitor economy is positioned and performing. It includes new primary research carried out for this DM Plan, and uses online sources that visitors would look to when finding out about the area.

3.2 Economic Volume and Value of Tourism to the Borough

Market research agency The Research Solution has estimated for the borough as a whole the **visitor volume** (numbers by day trip and overnight), **value** (£mn spent by segment of visitors into sectors of the local economy, directly and indirectly through the multiplier effect) and **jobs** (employment numbers both total numbers and Full Time Equivalents', again direct and indirect). Estimating the Economic Impact Assessment of Tourism in local areas is undertaken using the 'Cambridge Model', originally developed in partnership with the Regional Tourist Boards. The assessment focuses upon the estimates of the overall volume of visits undertaken to the defined area, expenditure in the local economy and the number of jobs that are dependent upon tourism.

The Economic Impact Assessment considers localised data such as the average accommodation occupancy levels, population size, and visitor numbers to the district or county's tourism attractions. Therefore, the assessment includes the most current localised information available (primarily 2015 data). The national survey data that forms the 'Cambridge Economic Impact Assessment Model's' key driver template is based on national 2015 results.

- The Cambridge model is an estimate of trips / nights / spend by visitors to a specified area – referred to as 'visitors'. Visitors are in essence making trips to the area, but of course these visitors can make more than one trip to any area throughout the course of the year. It is important to remember that estimated volume (trips and nights) to a specified destination **IS NOT** an estimate of visitor numbers but an ***indication of the number of trips made and the number of nights spent*** in that area
- The methodology and accuracy of the sources vary. The results of the model should therefore be regarded as estimates which are indicative of the scale and importance of visitor activity in the local area. In the national tourism surveys, sample sizes for each area changes year on year. **As such, the results of the Cambridge Model are best viewed as a snapshot in time and we would caution against year-on-year comparisons.**

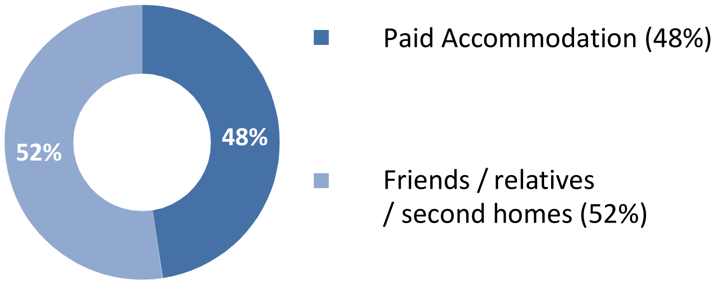
Appendix C sets out the full report including methodology and key impact assessments.

Rugby Borough 2015 Tourism Economic Impact Assessment Key Figures

Trips:

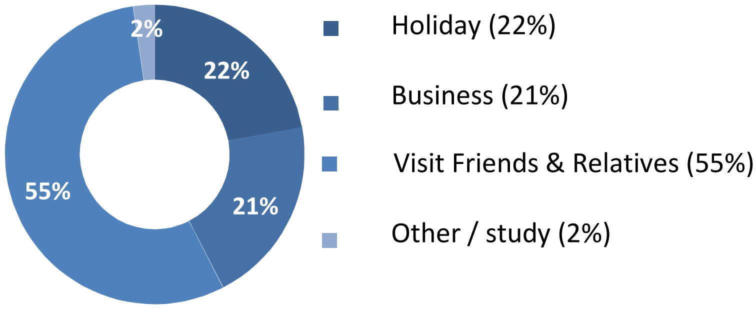
- Total 2,273,000 trips to borough by all types of visitors
- 2,100,000 as day trips (all UK)
- 172,000 overnight trips (average 3.6 nights)
- Comprising 136,000 UK overnight trips, and 36,000 from overseas – staying in all forms of accommodation types
- Staying 612,000 nights.

Trips by accommodation:



- Approximately half the overnight trips are in paid commercial accommodation, and half with non-charging friends and family.

Trips by purpose:



- The key purpose of visit is driven by trips to visit friends and family, followed by leisure/ holiday and business.

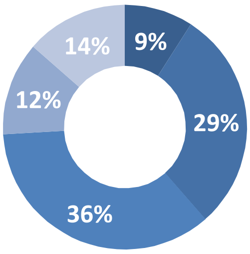
Nights:

- Total staying nights 612,000
- 335,000 as overnight UK
- 277,000 by overseas staying

Spend:

- Total direct visitors spend of £110 million
- The majority of this is through Day visits, with £66.8 million
- Staying overnight spend accounts for an expenditure of £32.8 million
- So, although the number of overnight trips is much smaller than day visits the expenditure per head per visit is considerably more for overnight stays
- Also c.£10 million generated from maintenance on second homes, boats, static caravans etc and additional local household spending due to people coming to stay with them
- A second tier effect, the **multiplier effect** is seen from local businesses spending on wages, services, goods and supplies into the local and regional economy
- This original £110 million direct visitor spend generates an additional £20 million into the economy through indirect and induced spend
- The **Total Tourism Value is £129.6 million into the Rugby borough economy**.

Breakdown of direct expenditure associated with trips



Accommodation	(9%)	£9.0mn
Shopping	(29%)	£29.3mn
Food and drink	(36%)	£35.4mn
Entertainment	(12%)	£12.3mn
Travel	(14%)	£13.5mn

Employment:

- Supports 1,672 full time equivalent jobs (FTEs)
- 2,272 actual tourism related jobs (mix of part time, full time and seasonal posts)
- Tourism accounts for 5.2% of all employment in the borough, this is a little below the 5.9% rate for tourism employment across Warwickshire as a whole.

3.3 Rugby Performance in Relation to Warwickshire

Warwickshire had a county tourism impact assessment undertaken for 2015 [4], and some districts also had economic modelling. In terms of the proportion of county tourism activity that Rugby borough generates, comparison can be shown as below:

Warwickshire	Rugby	2015	Rugby share of county
14.5	**2.27**	**million trips** were undertaken in the area	**15.6%**
13.2	**2.1**	**million** day trips	**15.9%**
1.3	**0.17**	**million** overnight visits	**13.1%**
4.0	**0.61**	**million** nights in the area as a result of overnight trips	**15.2%**
£727	**£110**	**million** spent by tourists during their visit to the area	**15.1%**
£61	**£9.2**	**million** spent on average in local economy each month	**15.1%**
£272	**£32.8**	**million** generated by overnight visits	**12.1%**
£454	**£66.8**	**million** generated from irregular day trips	**14.7%**
£1,051	**£129.6**	**million** spent in the local area as result of tourism, taking into account multiplier effects	**12.3%**
18,941	**2,272**	**jobs** supported, both for local residents from those living nearby	**12.0%**
13,626	**1,892**	**tourism jobs** directly supported	**13.9%**
5,315	**380**	**non-tourism related jobs** supported linked to multiplier spend from tourism.	**7.2%**

On the whole the estimates for various aspects of **tourism across Rugby borough indicate that the area accounts for between 12-16% of different measures of tourism in Warwickshire, or around one sixth**

[4] Economic Impact of Tourism Warwickshire 2015, The Research Solution, 2016

to seventh share of the county's tourism economy. The impact model factors in key drivers such as population size, accommodation stock, overseas visitor numbers and visitor attraction numbers to build the impact estimates.

The model estimates lower than average spend per head for visitors to Rugby borough than to Warwickshire, although length of stay is slightly above the county average:

	Rugby	**Warwickshire**
Average length stay (nights per trip)	3.56	2.98
Spend per overnight trip (all spend purposes)	£190.63	£204.11
Spend per night (all trip spend / nights)	£53.58	£68.41
Spend per day trip (day only, no overnight)	£31.81	£34.56

By comparison with the larger area of Warwick and Stratford on Avon Councils, the Research Solution's 'Shakespeare's England Tourism Economic Impact' report for 2012 (note, not for the same year), calculated that:

- 9.6 million trips were taken in Shakespeare's England – 8.8 million day trips and 0.83 million overnight visits
- Visitors spent £417 million in the area, which is an average of £35 million spent in the local economy each month
- Overnight trips account for a total of 2.24 million nights in the area. These overnight visits generated £149 million, compared with £267 million from day trips
- The 9.6 million trips account for a total value of tourism to the local business turnover of £547 million, which supports 9,588 jobs.

These figures are linked not only to the more well known national and international destinations, but to the larger overall populations, greater volumes of hotel bedspaces, etc.

Some other comparisons of **day visiting** for Rugby borough and nearby areas can be drawn by using local authority area estimates derived from national sources[5]. The GB Day Visits Statistics for 2015 examines a range of day visitor behaviour, estimated at the local level.

Rugby Day Visits & Expenditure Compared to Surrounding Authorities (2013-15 three year average)

Place	**Day Visits (millions)**	**Expenditure (Millions)**	**Av spend per visit**
Rugby (borough)	**2.31**	**£52.97**	**£22.93**
Coventry	4.47	£167.09	£37.38
Daventry	3.29	£83.54	£25.39
Harborough	1.40	£25.94	£18.52
Nuneaton and Bedworth	1.60	£43.48	£27.17
South Northamptonshire	2.43	£84.76	£34.75
Stratford-on-Avon	3.69	£109.71	£29.73
Warwick	3.84	£107.06	£27.88

Source: Tourism day visits by Local authority 2013-2015 three year averages, The GB Day Visits Statistics 2015

NB: Tourism Day Visits are a sub-set of those all Leisure Day Visits which last 3 hours or more.

[5] Tourism Day Visits by Local authority 2013-2015 three year averages, The GB Day Visits Statistics 2015

Rugby borough, with c2.3 million estimated tourism day visits by this measure, falls midway between the 'quieter' authorities of Harborough and Nuneaton and Bedworth, and the busier Warwick and Coventry. The modest scale of the numbers should be treated with some caution, but the indication is that the average **spend per day visitor head is particularly low in Rugby at just £22.93**. It is likely to be a reflection on the nature of the places in which to spend, mainly in the form of limited number of fee charging attractions and activities, with more outdoor 'things to do', along with many non-premium price retail and catering establishments. **This suggests that a future growth in expenditure can arise, not just from greater volumes of visitors, but from more opportunities to spend more, and at higher levels per head in terms of the products and places that are available to spend upon**.

Growth prospects are forecast to be strong for Warwickshire from the county tourism research briefings. Tourism business turnover in Warwickshire grew by +7% to over £1billion in 2013. International tourists' spending in Warwickshire increased by 25% in 2014 to £145 million, as 307,000 visits were made across the County.

Nationally, tourism is forecast to grow by 5% per annum in real terms to 2020.[6] This will inform the future growth targets for this strategy.

3.4 Numbers of Visitors to Attractions and Events

A variety of sources have been used to gain insight into the scale of attendance to leading visitor attractions and events across the borough – a broad range of urban and rural products. It should be noted that 'visitors' to these are mainly local residents and external tourists from both close by and farther afield. Few venues publish their numbers, so the following reflects limited published data, along with information directly from the operators as part of this consultation process. This results in few venues being able to demonstrate more than the past year's attendances.

Visitor Attraction and Event Numbers across Rugby Borough (notes on estimates follow)

Location	2016	Rural/ urban	Charge
Draycote Water	c500,000	Rural	Free/car parking
Coombe Country Park	c340,000	Rural	Free/car parking
Ryton Pools Country Park	c170,000	Rural	Free/car parking
Rugby Art Gallery & Museum	c79,000	Urban	Free
Toft Studio (workshops/ alpacas)	c30,000	Rural	Using the café
Brandon Marsh Nature Centre	c29,000	Rural	Paid
World Rugby Hall of Fame	c12,000	Urban	Free /paid –first 5 months data
Hillmorton Locks – lockages/pax	c10,000/60,000	Rural	Free
Festival of Culture 100+ events	c9,000	Urban	Free
Fireworks November	c9,000	Urban	Free
Bikefest, one weekend	c6,000	Urban	Free (1,000 joined the ride)
Food and Drink Fest: over 3 days	c3,000	Urban	Free
Rugby School/ Museum/ tour	*Not available*	Urban	Paid /free
Webb Ellis Football Museum	*Not available*	Urban	Free
Close by			
Midland Air Museum (Cov airport)	c30,000	Urban	Paid –in Warwick District
Stanford Hall	c25,000	Rural	Paid – Harborough District

Source: Visit England Visits to Attractions, 2014, 2015, and A Meredith Associates/Roundberry Projects

[6] WCC, Update on Warwickshire's Support for Tourism, Cabinet Paper, September 2015

Notes:

Draycote Water: 500,000 visits per year (based on 160,000 paying cars with 2-6 people per car). Distance travelled: 0-5 miles 35.6%; 6-10 miles 24.8%; 11-20 miles 18.0%; More than 20 miles 21.6% (visitor survey of 838 customers May to Aug 2014).

Rugby Art Gallery & Museum (RAGM): is a cultural and council asset separate to the new World Rugby Hall of Fame. RAGM numbers for the year April 2015 – March 2016, before the creation and autumn 2016 opening of the World Rugby Hall of Fame; the site comprises three spaces –

Museum, 30,937 Art Gallery, 26,349 Floor One Gallery, 21,777

Some visitors make a visit to all three spaces and others that only visit one so RBC count visits as there are different offers in each space. The reality is likely 35-40,000 actual visits, but not tracked.

World Rugby Hall of Fame: Located as a whole floor gallery within the RAGM. Opened in mid November 2016, free entry with numbers tracked, and moved to charging from the start of April 2017. Numbers show healthy early audiences, followed by an expected drop off from the charging date:

Nov 2016	Dec	Jan 2017	Feb	March	April- charge	TOTAL to date
1,722 (13 days)	2,476	1,693	2,784	2,514	746	11,935

Hillmorton Locks: Busiest canal lock in the UK, with around 10,000 openings/ uses of the locks annually (known as lockages) and at least 1.5 boats enter per movement/ lockage x an average 4 persons per boat. Potential of 60,000 persons pass through p.a.

Clearly, the predominant attractions are the large rural country park recreational environments. The urban attractions/ heritage sites are notably lower in the volume of visitors attracted.

Looking in contrast to other areas of Warwickshire and Coventry shows that by comparison, many of these numbers are fairly modest – for example elsewhere:

Example Visitor Attraction numbers for other areas of Warwickshire and Coventry

Location	2015 /16	Rural/ urban	Charge
The Royal Shakespeare Theatre & Swan Theatre	1,002,040	Urban	Charging
Shakespeare Birthplace Trust combined all sites	771,700	Urban	Charging
Shakespeare Birthplace (single site) 2014	403,911	Urban	Charging
Warwick Castle (2008 estimate)	c800,000	Urban	Charging
Coventry Transport Museum(2012)	420,000	Urban	Free
Kingsbury Water Park	c400,000	Rural	Free/car parking
Kenilworth Castle	108,000	Urban	Charging
Nuneaton Museum & Art Gallery	c70,000	Urban	Free

Source: Association of Leading Visitor Attractions (ALVA) 2015/16, A Meredith Associates

Notes:
Warwick Castle no longer shares its numbers, but they were estimated back in 2007/8.
Coventry Transport Museum figure in 2012, understood to have declined since then.

3.5 Accommodation Stock

The accommodation sector in the borough is broadly made up of five main types of properties:

- **Serviced accommodation -** hotels, motels (independent and chains)
- **Serviced accommodation** – smaller B&Bs, guest houses, inns, etc. (smaller properties)
- **Self catering** – cottages and apartments
- **Camping, caravanning**, including pods, glamping, etc
- **Canal narrowboats** – including travelling hotel boats.

These groups are explored in the following sections.

Warwickshire County Council and Rugby Borough Council hold lists and contacts of known stock, used by the tourism website www.therugbytown.co.uk and Rugby Visitor Centre. The core accommodation list is based on known stock, of both inspected/graded accredited properties, and also ungraded ones. In the table below, the establishments that are actually located within the borough are identified.

Visitor Accommodation Stock Noted by Local Authorities

Type of establishment	Number of establishments	Number of rooms/ units/ pitches	Number of beds
Hotel	20	1,080	2,200
Guest house/ B&B/ Inn	16	94	160
Self catering	3	6	24
Camping/ caravan	5	160	n/a
Canal boat/hire	5	74	At least 475 berths
Total	**49**	**1,414**	**2,860**
Additional large hotels close across rural border #	3	570	1,250

Jury's Inn Hinckley Island Hotel, Ibis at DIRFT and Holiday Inn at Crick

3.5.1 Commercial Serviced Accommodation Stock

Within Rugby borough, the predominant form of accommodation is the commercial serviced sector, mainly in terms of rooms and bedspaces, as larger chain hotels and conference venues. Weddings are also a major form of weekend bookings, with business /meeting / conference use on the weekdays, as well as passing through overnight business stops.

- There are approximately 1,080+ bedrooms, mainly as larger hotel chains within the borough
- A number of other large hotels are located just beyond the local authority borders, which have an impact into the 'tourism sphere of influence', but which lie within Northamptonshire and Leicestershire – for example the Jury's Inn Hinckley Island Hotel, Ibis at DIRFT and Holiday Inn at Crick.
- These have a further 570 bedrooms around the blurred borders at major transport junctions and business locations
- In reality, around a dozen or so larger venues account for over 90% of all the hotel rooms and beds
- The above analysis excludes any hotels within the eastern urban location of Coventry that border the A46 and Rugby Borough boundary.

Key chains at different price/ quality points are spread out across the borough serving different needs, and include:

- Travelodge – 2, one in town, one on A45
- Premier Inn – 3 edge of town and Ansty business park
- Vintage Inns/Innkeepers Lodge – Dunchurch/A45
- Holiday Inn – Ryton/ edge Coventry
- Mercure – Brandon, serving Coventry mainly
- Macdonalds – Ansty, serving Coventry mainly
- Coombe Abbey Hotel part of the small 'No Ordinary Hotel' group and independent Dunchurch Park Hotel and Conference Centre reflect the larger higher quality/star rated venues.

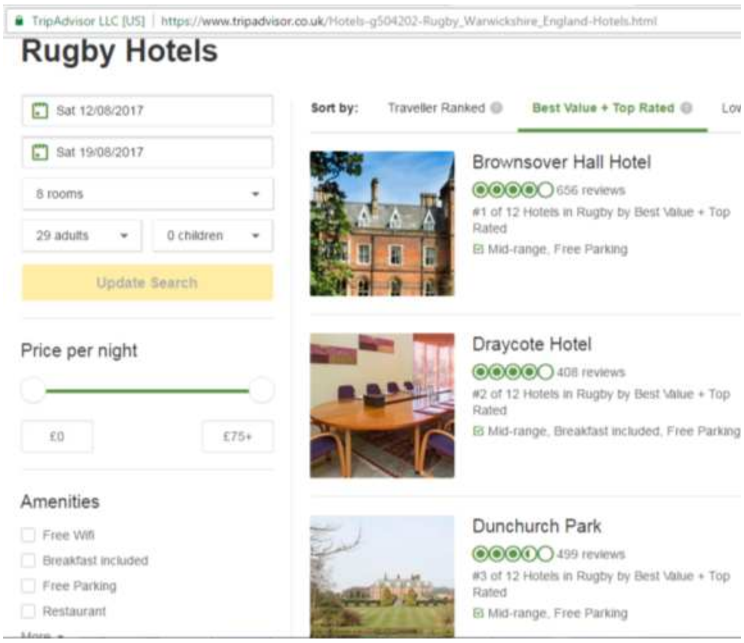
The smaller independent hotels and B&Bs tend to be within Rugby town or immediate surrounds, including Brownsover Hall, Draycote, the Grosvenor and Carlton and Golden Lion at Easenhall and Olde Coach House at Ashby St Ledgers.

Numerous farmhouse small establishments, B&Bs and country hotels lie within the villages and countryside around the whole borough.

As noted, Warwickshire County Council and Rugby Borough Council hold lists and contacts of stock, used by the tourism website www.therugbytown.co.uk and Rugby Visitor Centre.

However, examining this contact lists, there are omissions with other stock having been found that the consumer can source online via sources such as Tripadvisor, Booking.com, LateRooms, etc. (all of which list the main properties covered by the Council accommodation listing websites). These tend to be smaller establishments, so their overall effect upon the total bedstock is limited.

Looking at Tripadvisor as one form of peer to peer recommendation and booking site for visitors, shows that consumers identify the top rated Rugby hotels as being the long established independents of Brownsover Hall, Draycote and Dunchurch Park.



It should be noted that the Village Green Hotel in Dunchurch is no longer trading as an hotel, but now provides long term Domestic and Business tenancy agreement rental accommodation suites with shared self catering kitchen. It is excluded from the above analysis of bedstock.

3.5.2 Self Catering Properties

The listings for self catering cottages and apartments that are held by both Rugby Borough Council and Warwickshire County Council are extremely limited in number, as just three rural and small scale in property unit size establishments. This impacts into the apparent number of units that are accounted for in the economic impact assessments.

However, the route to market for many people taking self catering holidays tends not to be focused on local authority/destination led listings. Numerous major (international owned/branded) online bookings sites include many more properties across the Rugby area than are locally listed at the Visitor Information Centre or rugby websites including www.enjoyrugby.co.uk.

All the major self catering/ holiday home rental organisations generate properties located in the borough or around the fuzzy boundaries. This includes:

Tripadvisor www.tripadvisor.co.uk/Tourism-g504202-Rugby_Warwickshire_England-Vacations.html

Sykes Cottages www.sykescottages.co.uk

Cottages.com (formerly cottages4you) www.cottages.com/

HomeAway www.homeaway.co.uk/

Booking.com www.booking.com

Holiday Lettings www.holidaylettings.co.uk/rugby [owned by Tripadvisor]

FarmStay UK www.farmstay.co.uk/

Hoseasons http://www.hoseasons.co.uk Warwickshire has 13 cottages listed, but none in Rugby borough

AirBnB **www.airbnb.co.uk**

The sites on these providers are generally small units/ cottages / farmhouses and some newer homes/ apartments in both Rugby and Brandon/Brinklow. Some cottages are listed on multiple sites.

Properties as at May 2017 are listed in Appendix D. In summary the main additions seen to boost the level of self catering in the area are:

Tripadvisor additional 8 units, 14 bedrooms, sleeps 29 people

Booking.com additional 6 units, 12 bedrooms, sleeps 27 people.

The rapid growth of AirBnB is beginning to have higher impacts on larger urban destinations, with owners listing their spare rooms. For a Rugby area search, 13 properties are listed as at March 2017, all with 4.5 or 5.0 /5.0 high ratings from users. Virtually all are not seen on other websites/ booking channels.

This is a reflection of how the market is changing and new sources to users are taking their place, usurping a number of existing established and sometimes more expensive/higher commission routes to market. Generally one bed or one room, either within owner's home, or self contained annex/ garden 'lodge' is available. These properties are generally small, blurring the distinction between holiday lets and temporary/longer term work/ business uses. They are located in both rural and urban locations within the borough.

The AirBnB sites, not seen on www.therugbytown.co.uk account for 13 properties, 14 rooms and approximately 22 bedspaces, which is a modest volume in total.

Thus, AirBnB, along with the Tripadvisor and Booking.com properties – indicates there are around 27 other establishments providing self catering in the borough/immediate border in 40 rooms with capacity for 78 people. These are real visitors, and long term business renters, contributing into the local economy through rental, shopping, eating out etc. However, they may not be receiving the best level of information about what to see and do within the borough ad they are not recognised as host venues generating a throughput of visitors to the area.

Self catering as a sector appears relatively under-recognised in the borough, but also nationally. Just published, April 2017, the latest report[7] from the English Association of Self Catering Operators (EASCO), show an estimated 8.8 million staying visitor trips were spent in self-catering accommodation in England in 2015. This equates to 55.5 million visitor nights and £4.2 billion in direct visitor spending to the economy. EASCO revealed that rural self-catering in England contributed £3.04 billion per year to the economy from accommodation spend alone:

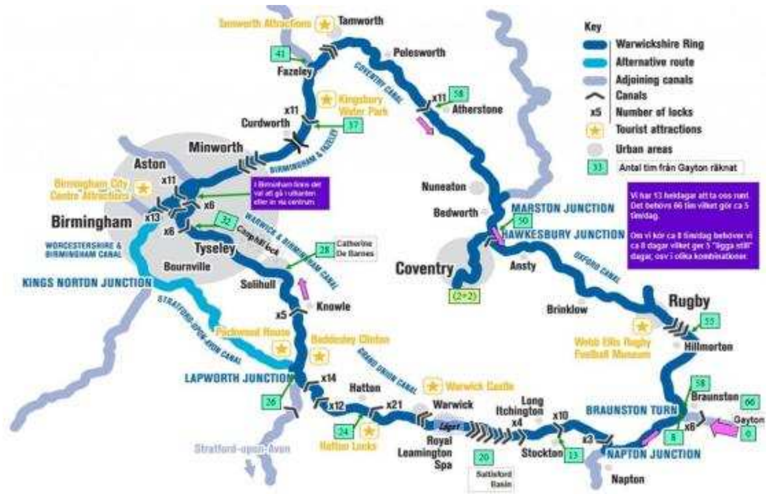
- For every £1 spent on self-catering accommodation, another £1 was spent elsewhere by visitors
- 50% of direct spend was on accommodation costs; shopping and food and drink accounted for 19%; travel 8%; and attractions/entertainment 4%
- Approximately 70,000 actual jobs were directly supported by self-catering visitor expenditure.

Thus, the implications for Rugby are that this under- appreciated sector of the accommodation business should not be ignored, and requires better understanding to benefit traders and visitors.

3.6 Canal Boating and Marinas

The Grand Union Canal and Oxford Canal pass through the middle and southern areas of the borough and provide connection into the greater West Midlands, rest of Warwickshire and the Warwickshire Ring, as well as into Northamptonshire and Leicestershire. Already noted, Hillmorton Locks see 10,000 lockages or openings with around 1.5 boat movements each time, making it the busiest lock on the UK network.

The canal appears an under-represented /appreciated part of the local visitor economy. As well as bringing in visitors from all over the UK, around 8% are from overseas, spending slow, quality time experiencing the area and stopping off, spending in waterside pubs, shops and walking into adjacent towns and villages for entertainment, supplies and refreshments.



The Warwickshire Ring eastern side lies mainly within the Borough.

In terms of the role of canal boat holiday hire, the capacity and price of boats represents a relatively significant value to the local economy.

Each boat, which range from capacity of 2 to 12 berths, is used for an average of 23 out of 37 weeks a year, with around 4 persons being the average occupancy. Hire costs range from c£450 for an small boat out of season to c£2,600 for a maximum size in

[7] Self-Catering Holidays in England – Economic Impact 2015, English Association of Self Catering Operators (EASCO), by The South West Research Company, April 2017

the peak – so it is not a cheap holiday. Research suggests that around the same amount again is spent per trip - mainly into the local economy.

There are five major marinas and moorings within the borough, with another three immediately outside. These cater for both residential, long term fixed moorings, and temporary visitor moorings, with shops/cafés and facilities. There are also hire fleet companies operating holiday hire lets out of these sites, including ABC Leisure, Black Prince. Other small wharfside fleet hire operators can also be found across the borough at Hillmorton, Brownsover and Newbold, including Willow Wren, Clifton Cruisers and Rose Narrowboats.

The main marinas are:

Ventnor Marina (Stockton / Napton-on-the-Hill)	230 berths/ moorings
Wigrams Turn Marina (Stockton / Napton-on-the-Hill)	226 berths/ moorings
Calcutt Marina – The Locks (Stockton)	100 berths/ moorings
Calcutt Marina – The Meadows (Stockton)	100 berths/ moorings
Brinklow Marina (Brinklow)	225 berths/ moorings
Napton Marina (Napton-on-the-Hill) just into Stratford-on-Avon district	70 berths/ moorings
Barby Moorings Marina (Barby) just into Daventry district	125 berths/ moorings

In total, these provide for 1,075 marina moorings – many of which are taken for long term/ residential/ over winter. A number are for passing trade and boat hire for visitors.

Also in the Rugby area of influence are major marinas with over 500 other moorings at:

Braunston Marina (also holds large Historic Boat Rally	250 berths/ moorings
Crick Marina	270 berths/ moorings

Planning permission was granted by RBC in 2013 for a major Onley Marina on the Oxford Canal, a £15 million project, named Dunchurch Pools Marina, a 550 berth scheme. This is under construction and the development will provide additional berths from 2017.

Hawkesbury Marina and Canal Village, near Bedworth and the Hawkesbury Junction end of the North Oxford Canal lies just beyond Rugby borough. This residential led development is proposed to have c150 moorings and recreation/restaurant facilities.

ABC Leisure operates a site at Rugby Marina at Newbold on Avon. The ABC bookings for this hire fleet for 2015 and 2016 came from the areas of the UK shown on the map, particularly strong in the London, South East and home counties areas.

Source: ABC Leisure Group, mapsdata.co.uk

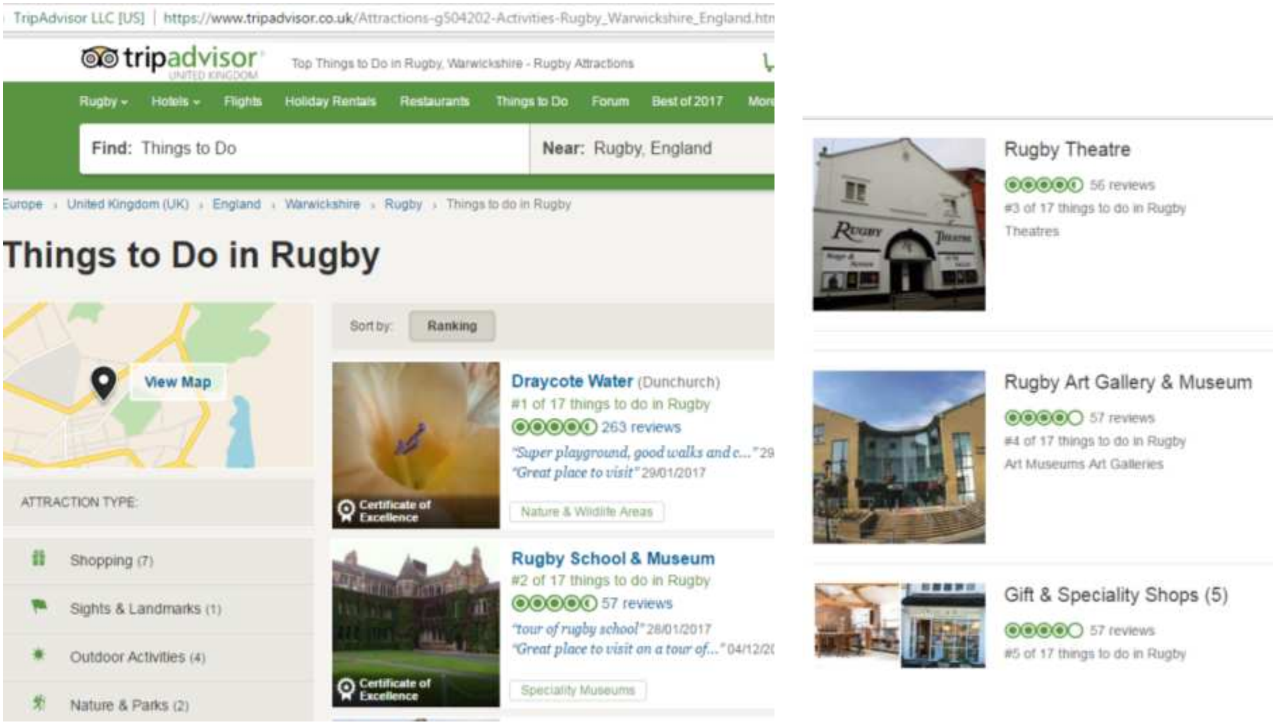
Comments made by boat hirers at the end of their visit about the Rugby/eastern Warwickshire area mainly relate to the condition of the canals, and include impacts of Coventry upon the Warwickshire Ring experience:

- *Many locks where in poor repair particularly nearing Banbury, also the canals where quite overgrown in places.*
- *Most of the Warwickshire Ring was nice, but the Coventry Arm was terrible. Lots of rubbish - it took two of us almost an hour to clear the prop once we got to the basin.*
- *Canal in very poor state of repair. Overgrown, broken trees.*
- *Canals really need trees to be cut back. Barely wide enough for 1 boat in places.*
- *The Oxford canal is lovely, the Coventry end of the Coventry canal is awful- dirty and polluted.*
- *Had a really good holiday and would go again but the canal and the banks were covered with rubbish which spoilt the scenery but nothing your company do about it.*

3.7 Consumer Feedback

There are limited visitor surveys and peer to peer feedback (eg Tripadvisor, Booking.com etc) which provide insight into how customers – as both local people and tourist visitors- perceive the Rugby borough visitor attractions, accommodation, etc. Hence at this stage, evidence is restricted.

Overall, using Tripadvisor as one source, the views about the product offer and quality are very positive. Most leading accommodation providers and attractions/ things to do are rated around 4.0 or 4.5 out of 5.0. However, the nature of the places rated indicates a relatively apparent low volume of choices of places to stay and things to do. For an external visitor considering the destination, this can potentially be off putting if the perception is that there's not a lot to do here – so why consider here, rather than other competing destinations and experiences?



Here, whilst very positive ratings for the key sites, the leading choices quickly decrease to small numbers of reviews that are generic about shopping compared to major attractions in say, Coventry, Warwick, etc. with larger volumes of reviews/ visitors.

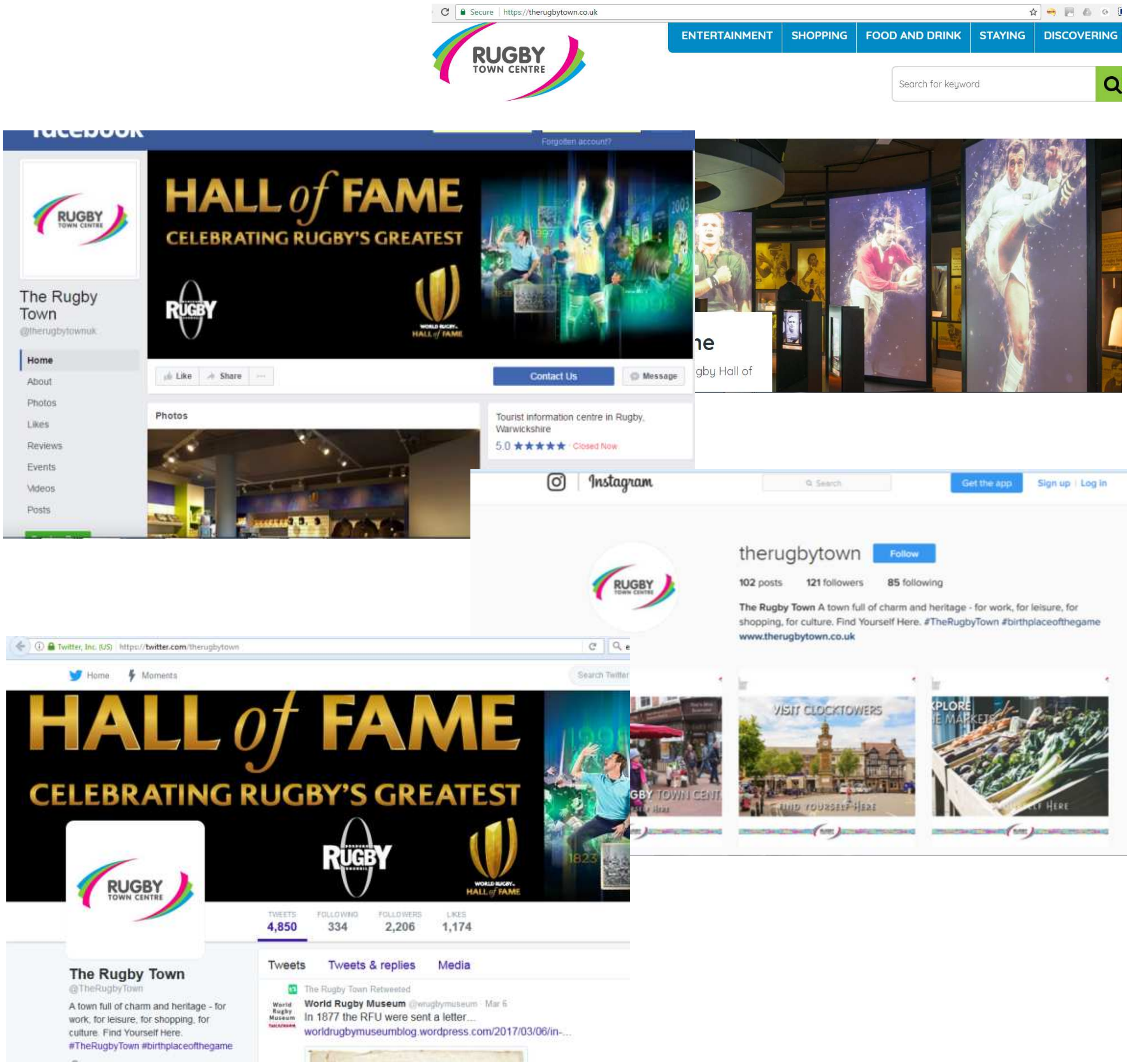
3.8 Online/ Print Profile of Rugby Borough

A range of online sites are reviewed here, identifying the media coverage in the main tourism literature and guides, including online/social media.

In order to present the town and borough effectively as a visitor destination, with an array of things to see, do, places to visit, accommodation choices in which to stay, there is a need for the websites and social media channels to be structured and the content to appeal to the emotions, not just be descriptive lists. Success comes from web and print design thinking as a visitor - entering the system from outside, enquiring and being tempted by imagery and emotive descriptions – to move beyond database listings.

For many years the Council's main visitor and information facing site has been www.enjoyrugby.co.uk/. This website has presented a welcome to the town, leading with the historic town centre/ Rugby School and images related to the sport. It has been updated and replaced in 2017 by www.therugbytown.co.uk.

In May 2017, RBC produced a new visitor website for Rugby under the new branding **The Rugby Town.** This is the new identity created for the town centre using the definitive ownership of ‘The’ to focus on the town centre, as a project led by the Council, linked to the BID /Rugby First. A second identity strand is for **‘Rugby Town Centre’.** This is connected to a bolder positioning of the Town Centre as a destination offering plenty to do, the Hall of Fame and rugby sport heritage, independent retail, cafés, restaurants, etc. It has a new and strong identity being harnessed through social media. The identity and likes/ followers etc are growing.



The content does vary between the online and social media channels, however, a strong focus is on the town centre, due to this being the lead destination for the whole borough, and the main best known visitor assets. There is a need to consider and evolve the presentation over time, as it is driven by the town centre and Business Improvement District agendas as the ‘attack’ brand identity, which do not give a fully rounded view of the whole urban-rural visitor destination. The town fringes and rural attractions and activities are lost and do not at present have any real presence within the focus of the online media. Stronger high quality photographic images and visitor friendly themes should be added to the content.

With content being directory driven, once a visitor moves past the topic home tabs – Entertainment, Shopping, Food and Drink, Staying, and Discovering – the content becomes 'dry', database lists again with a key focus very much on the town, not the borough and surrounding areas and only presented as text entries, no imagery or appeal. Lacking a map, neither overall static for the town or borough, nor that can be interrogated, makes it difficult for the searcher to know if an A-Z listed attraction or hotel is town centre, semi-rural or out near Hinckley.

- There needs to be an overhaul that puts visitor needs at the focus of the sites' structure and operation. This must be aligned with better understanding and research into who are the users of the websites and social media – the needs of a local resident and their knowledge base are totally different from those of a potential enquiring visitor from beyond the region who may never have been to Rugby before or have heard of any locations.
- Clear online connections and referrals to the Visitor Centre for further information would assist enquirers.

At present, the print literature for visitors still uses the 2015 guide, focused on the town centre and produced to support visitors coming to the town particularly in connection with the 2015 Rugby World Cup being hosted by England. This has been a good asset, but requires updating and linking with all the brand identity and content that has evolved since then.

3.9 How others Present Rugby

Lonely Planet www.lonelyplanet.com/england/rugby

"Warwickshire's second-largest hub, Rugby, is an attractive market town whose history dates back to the Iron Age. But it's most famous for the sport that was invented here and now takes its name, and is a place of pilgrimage for fans.

The game was invented at prestigious Rugby School in 1823 when William Webb Ellis is said to have caught the ball during a football match and broken the rules by running with it. Situated just across from the Webb Ellis Rugby Football Museum, the school itself is closed to the public, but you can peek at the hallowed ground through the gates on Barby Rd. A gleaming golden statue of William Webb Ellis stands outside the main Rugby School gates on Lawrence Sheriff St.

A whizz-bang new interactive World Rugby Hall of Fame is due to open in the Rugby Art Gallery, Museum & Library in late 2016."

Read more: www.lonelyplanet.com/england/rugby/introduction#ixzz4YILllcbD

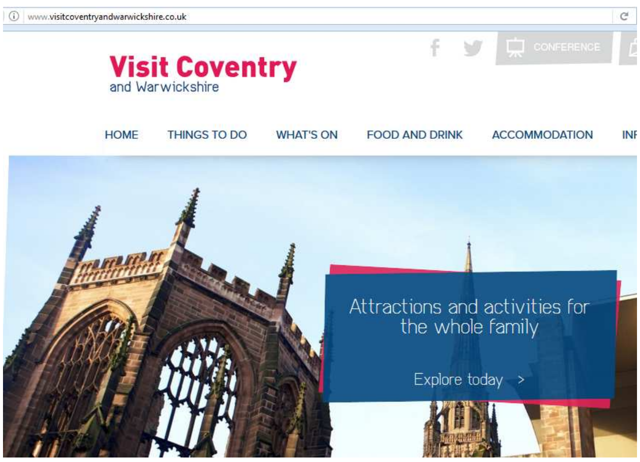
Top things to do: Rugby Art Gallery, Museum & Library; Webb Ellis Rugby Football Museum; William Webb Ellis Statue.

Rough Guides – no mention of Rugby (apart from as a sport in New Zealand, South Africa and Wales!)

3.10 Visit Coventry and Warwickshire

Visit Coventry and Warwickshire is the destination coordinating organisation (but not a full DMO) for Coventry, crowded between Shakespeare's England and Marketing Birmingham.

www.visitcoventryandwarwickshire.co.uk is the website for Coventry, with links to the wider Warwickshire as a whole, but it has only limited references to Rugby – despite 'speaking for' the county.



Within the **100 Things to See and Do in Coventry and Warwickshire** list, in the top 10 places, it features Rugby positively through:

3. Adventures await at Coombe Country Park

#7. Visit the home of Rugby football at the Webb Ellis Rugby Football Museum

9. Explore 10 acres of beautiful organic gardens at Ryton Gardens

The Inspirational Itineraries for Coventry and Warwickshire section is less connected, making no mention of Rugby in its trails:

www.visitcoventryandwarwickshire.co.uk/content/inspirational-itineraries-coventry-and-warwickshire

Two day itinerary – mainly Coventry city centre – with second day Warwick and Stratford

Top Warwickshire family days out - Warwick, Kenilworth, Stratford, Hatton

Warwickshire heritage gems – Warwick, Kenilworth, Ragley Hall, Heritage Motor Centre.

Relations should be strengthened with Visit Coventry and Warwickshire, and up to date information about Rugby venues, attractions, events, etc. should be actively maintained, so that the Coventry gateway supports visitor enquiries and information gathering about the Rugby area.

3.11 Shakespeare's England

Shakespeare's England positions itself as the official tourism guide for Stratford-upon-Avon, Warwick, Kenilworth, Royal Leamington Spa and the beautiful surrounding areas. The DMO reflects the two local authorities and private sector membership.

http://shakespeares-england.co.uk/ also references being the "Official Tourism Guide for Warwickshire." In terms of looking at how Rugby is presented, a neighbour, rather than partner, there is a positive section: http://shakespeares-england.co.uk/rugby.

This is essentially a link about the town centre and sporting heritage of the town and core places to visit. Using the internal site search engine brings up no references for Dunchurch, Ryton, Draycote or Brandon, etc.

3.12 Halifax Quality of Life 2015 Rankings

In the Halifax Quality of Life 2015 Rankings of the Top 50 Local Districts in England – Rugby Borough ranked a very creditable 32nd, one of five West Midlands authorities, behind Wychavon (Worcestershire), Stratford-on-Avon, Malvern Hills (Worcestershire) and Lichfield (Staffordshire). This analysis by Halifax bank was based on a series of published quality of life, social amenities, employment, crime/safety etc indicators. Whilst not a 'tourism' analysis, it reflects aspects of the borough's fabric that have a positive bearing on the destination.

SECTION 4 VISITOR PROFILES AND TARGET MARKETS

4.1 Existing Visitor Profile and Prioritised Target Markets

The value and volume of Rugby's tourism was described in detail in Section 3 above. This data and other Visit Britain/ Visit England research shows the predominance of **day visits** to the borough's visitor economy, with an average of 2.1million such trips in 2015. The **overnight market** is markedly smaller with a total of 172,000 staying trips generating 612,000 nights in the borough. For Rugby borough as a whole there is limited specific market segmentation, so the following analysis takes into account insight from businesses consulted, as well as county and neighbouring areas' detailed existing surveys. A key future action within the management plan is for the partners and businesses to generate and share more market research into the audiences already visiting the borough.

The evidence from the industry consulted so far provides a range of observations on key markets for different sectors. In broad terms visitors encompass these main groups (plus many other niches):

- Day visits (half day or so), generally from West & East Midlands counties/ 60 minutes travel
- Short stay leisure 1- 3 nights
- Long staying leisure – incl self caterers / caravan
- Business / conference – including long stay
- Visiting friends & relatives
- Sport/ activity – golf, sailing
- Canal cruisers
- Parents visiting students/ inter-school events @ Rugby School
- Passing by/ pop off the motorway for a night
- Heritage /culture/ literature seekers
- Pilgrims to birthplace of rugby sport
- Niche subject / special interest groups/ festivals and special events.

4.2 Overnight stays example insight

Evidence collected shows the importance of **Business Tourism** to the commercial accommodation sector both in Rugby town and around the borough (e.g. Coombe Abbey, Dunchurch Park, Draycote Hotel, Carlton Hotel) as well as for Ibis, Premier Inn, etc. This can be divided into two types:

- Firstly, and the most significant contributor, appears to be business people **attending conferences/ exhibitions/ meetings** at the hotels themselves or nearby businesses and exhibition venues in other cities (NEC, Ricoh). Industrial and enterprise sites such as the Ansty Technology Park (which is located within the borough) and businesses in Rugby town were mentioned as generating such visitors. Rugby's central geographic location and access to major roads such as the M1, M6, M45, A5 can also make it a popular choice for companies seeking a convenient place for delegates travelling from scattered points.
- This geographic location leads to the second type of business visitor being those who are simply **seeking overnight accommodation en route** to elsewhere. For many, the growth of the Travelodge, Premier Inn and Ibis properties, as well as the MacDonald and Mercure brands, and independents satisfy these needs.

Essentially there are two variations on this:

- **Non-discretionary markets** where the visitor attends/ stays for a specific purpose and there is limited choice on the location - such as for a business meeting with the company located here

- **Discretionary markets** where there is a choice – such as attending an informal conference or trade show, not essential and the event may not always be held here.

Consultations have demonstrated that the strength of business tourism means that **hotels are generally busy midweek during school term time**. There tends to be notable capacity in school holidays and at weekends – when these hotels see more leisure and wedding trade.

Leisure overnight visitors tend to be drawn by events or activities, particularly visiting friends or family, for instance attending weddings. There is therefore a varied age profile. Golfing and themed events such as Bike Fest were cited by consultees. The road and rail connections are again a strength. The variety of smaller more distinctive hotels and guest houses as well as larger chain hotels provide options for the different types of visitor, based around facilities, quality and price.

There is a relatively strong **canal boat** offering noted through the Borough with a concentration of marinas towards the south. The North Oxford canal runs through the edge of Rugby town and passes attractive villages in the borough.

4.3 Day visits example insight

Venues and attractions hosting day visits such as Draycote Water cited **mid-week visitors** as being mainly parents with young children and also the silver pound, older and retired people, mainly from around 30mins drive time. At **weekends** the market is family groups, and also people coming for specialist events eg triathlon/ sailing. The latter groups coming from a wider distance sometimes over 2 hours drive.

An example of a **specialist craft** business, Toft UK, attracts visitors from Germany, France and China, however these visitors are generally staying overnight elsewhere, often London and travel for the day. The majority of their clients are domestic visitors up to 2 hours drive, although some do come and stay.

Although relatively new, the **Rugby Hall of Fame** is already attracting some domestic and international groups of amateur rugby players. These appear to be staying outside the area and coming in as day visitors. It is difficult to assess so far the profile of visitors to the attraction. It is attracting around 2,500 visitors per month during the early months of free entry.

Day visitors to the **town centre are drawn by specific family, cultural, food drink and other events linked to the BID**, as well as RugbyFest - a new festival around the sport of rugby. Others visit to see Rugby School and the attractive heritage environment as well as the birthplace of the sport of rugby. There are a small number of coach trips for this purpose.

Rugby Borough Council Visitor Centre has been seeking to attract more group visits from across the country to the Hall of Fame and launched a package at the British Travel & Tourism Show in March 2017. Rugby Borough Council's Communications Team is promoting the town via radio advertising on the Touch FM stations across the Midlands.

4.4 Warwickshire Visitors

Research for Warwickshire County Council has identified that "Warwickshire is attracting a range of different markets – international visitors, domestic short breaks, day trippers, business visitors and conference delegates[8]."

Warwickshire's Visitor Economy Framework[9] identifies good prospects for tourism growth based on the following key market trends:

- The county should benefit from the continuing staycation trend in the domestic market and the **growing demand for short breaks**

[8] Update on Warwickshire's Support for Tourism, Cabinet Paper, WCC, 10 September 2015
[9] Warwickshire Visitor Economy Framework 2013-2018, TEAM for WCC

- The **international awareness and appeal of Shakespeare, Stratford-upon-Avon and Warwick Castle** put Warwickshire in a strong position to capitalise on the anticipated future growth in overseas visits to the UK
- The county has good potential to attract short break demand from the growing **empty nester, early retired and pre-family markets**
- Warwickshire has a sizeable and growing catchment population **for day visits.**

There is scant mention of Rugby in the Framework, however, the VEF does note that visitors are increasingly seeking **experiences** which are becoming dominant in tourism markets "the 'what' is more important than the 'where'" and this is an opportunity for Rugby borough. The VEF has also identified four broad groups of visitor that may be attracted to the county. Each of these groups will have "specific market segments – with different characteristics, interests and motivations, and needs":

- **Overseas visitors** (on their second /third visit to the UK, keen to explore beyond London)
- **UK short break takers**
- **Day visitors from home**
- **Business visitors** (mainly meetings and small conferences, weekdays and term-time).

4.5 Visitor Segmentation across Warwickshire and the surrounding area

4.5.1 Shakespeare's England

Shakespeare's England, the Destination Management Partnership for Warwick and Stratford Districts relates mainly to the area that abuts Rugby borough to the west/south west. There are good road links through attractive countryside, as well as the A45/46 corridor. The area is seen as having a strong draw for short breaks, but weaker in longer holidays. It is also very strong on day trips from a wide area. Market segments attracted to Shakespeare's England[10] are considered to be:

- Trendies: young, free, single, students from nearby universities
- Traditionals: retired couples, empty nesters, singles
- Families: seeking child friendly day trips
- Culture vulture couples: seeking new experiences, research what they are going to do
- Cosmpolitans: keen on art, culture, shopping, nights out, active
- High Street Junkies: follow the trend, like well-known brands
- Business travellers: conferences and meetings
- International visitors: Chinese, Japanese, American, European. 'Pilgrims to Stratford'
- New European Settlers: EU families living in Warwickshire or region. VFR potential.

4.5.2 Coventry

Neighbouring Coventry City Council's tourism plan[11] identifies:

- The importance of business tourism for the area
- Ambitious goals for growing the leisure market through City Breaks.
- The **bid** to be **UK City of Culture in 2021** is part of Coventry's strategy to improve perceptions of the city and establish it as a cultural and heritage destination.

[10] Visitor Segmentation/Market Analysis, Shakespeare's England Destination Management Plan, March 2015
[11] Coventry 2014 – 2024 An Emerging Vision for Tourism

4.5.3 Nuneaton and Bedworth

The main market opportunities for Nuneaton and Bedworth are seen to be:

- Day visitors from within one hour's travelling time
- Business visitors linked to Ricoh, Coventry, NEC
- People attending social functions
- Short breaks based on local heritage and events
- Opportunities have been identified in working with neighbours around business tourism; George Eliot's bicentenary in 2019; and the arts.

4.5.4 North Warwickshire and Hinckley & Bosworth

A Destination Management Plan is currently being drafted for these two boroughs spanning the Warwickshire/Leicestershire boundary. The draft Plan foresees potential for tourism growth in:

- Developments at Twycross Zoo eventually doubling visitor numbers to c1 million and provide increased opportunities to attract family break stays
- The "Project Thor" adventure attraction at the NEC as a driver for family break business
- Projected population growth in the boroughs fuelling day visits, VFR, demand related to weddings and family occasions
- Strengthening demand for short breaks, growing interest in weekend escapes to the country and increase desire to go somewhere different
- Development of MIRA technology park will boost business demand
- Potential to capitalise on tourist accommodation trends as there is a shortage of self-catering and camping provision

4.5.5 Northamptonshire

There is currently no destination organisation and no visitor strategy for the county, it is therefore difficult to assess the strategic visitor profile. However:

- Silverstone racetrack is a major draw to the county and Rugby borough accommodation businesses report that they service its large events.
- The canal and rural offer with several historic houses have synergies with that around Rugby.
- Daventry District Council has plans to open a new stretch of canal with a boatlift. By way of comparison the Anderton Boat Lift in Cheshire receives c120,000 visitors a year.

4.5.6 Leicestershire

The Leicester and Leicestershire Tourism and Hospitality Sector Growth Plan 2015-20 notes that:

- The county has seen significant sector growth since 2010 (5.1% compared to 3.3% for England)
- It does well in day visits, less well in overnight stays. 30.41 million tourists visited Leicester and Leicestershire in 2014, which equates to 36.64 million tourist days

To drive visitor growth the following segments are prioritised by Leicestershire Promotions:

- The "Stay, Play Explore" branded campaign offering short breaks for 6 market segments: •Family Fun, •Gourmet Taste, •King Richard III Heritage, •City Treat, •Veggie Vacation, •Foxton
- Other priorities are Business tourism, group tourism, festivals and events.

4.6 The Potential and Priorities for Future Tourism Growth in Rugby

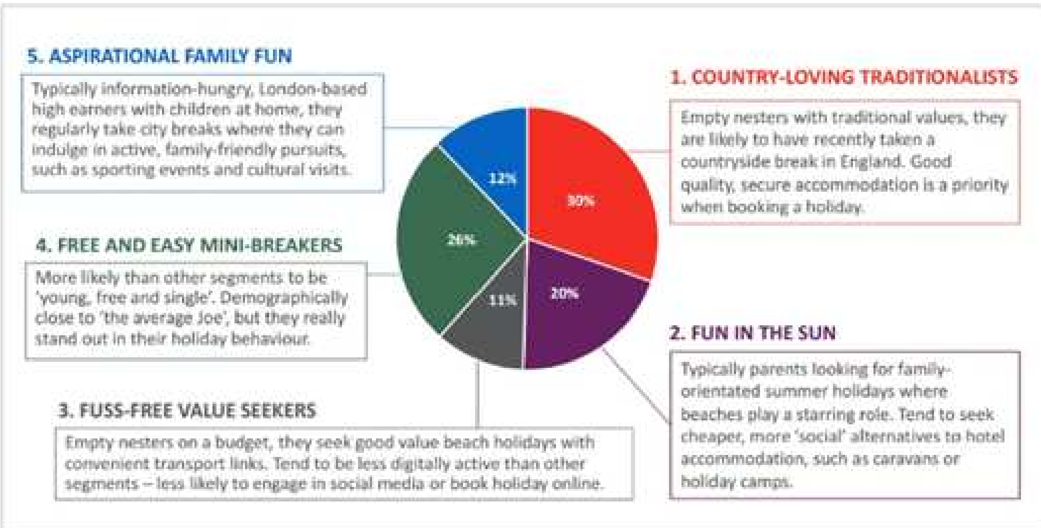
Combining local data with national research carried out by Visit England enables likely target markets and priorities for Rugby to be established.

Visit England insights and the Warwickshire VEF make the point that visitors expect great experiences first and foremost. The channels through which visitors are drawn to experiences and are inspired to visit places or attractions are now dominated by online and social media (the new word of mouth). Traditional print marketing still has a role, particularly once visitors are in-destination.

Social trends need to be taken into account as population profile and society structures nationally are changing. The following are forecasts by Visit England which will have varying impacts on the domestic leisure tourism visitor:

- The ageing society; accessibility needs – but also a shift in their attitudes. The next retired generation heavily comprised of the baby boomer cohort, who differ greatly from previous older generations in their attitudes to leisure – they are generally more affluent and far more leisure focussed than previous generations of older people
- The medium term future will also see a rise in the number of younger people, as a result of a sustained rise in fertility rates since the mid 1990s – a baby boom
- Not every section of society is growing; there will actually be a decline in the number of people aged 35-49 over the next few years, leading to a 'squeezed middle' generation
- Changes in the shape and composition of families - from a horizontal one to a vertical one (i.e. a family with more tiers – grandparents and great grandparents – but fewer people in each generation – fewer siblings and cousins)
- New types of family, gender mixes, and 'blended' second families after divorces/re-marrying
- An increasing number of inter-generational family holidays.

Visit England has developed a new visitor segmentation, based on a combination of what matters to visitors, their holiday behaviour, and demographics.



These reflect the segmentation in the Warwickshire Visitor Economy Framework as set out in paragraph 4.4 above.

In drawing together evidence from businesses in Rugby borough and research for Warwickshire and neighbours the following target markets for Rugby borough can be set out:

- There are opportunities to grow visits from the **day visitors** from home especially promoting the town's easy accessibility by rail from London, Birmingham and other cities
- **"Free and Easy Mini-breakers"** / **UK short break takers** may also be attracted to stay in Rugby town as the birthplace of the game with the Hall of Fame, Webb Ellis and school offering things to see complemented by a good range of restaurants and bars in the town…..but only if there is overnight accommodation of the right standard and price to complete the package
- The attractive rural hinterland of Rugby town is ideal for **"country loving traditionalists"/ UK short break takers** and can be promoted as a base for exploring nearby destinations. Canal holidays also fit into this category
- Rugby borough has strengths in the **business visitor** market which can be further developed, by promotion of the offer with local manufacturing and distribution sites as well as for conferencing – to explore beyond the overnight hotel venue
- **Overseas visitors** with a special interest in the game of rugby should be targeted and packages offered which encourage overnight stays in the borough or nearby with partners.
- With the opening of the Hall of Fame there is more scope to attract **Group tours** to town. The range of group tours could be extended by working with neighbouring authorities around literary and heritage themes.
- The rise of **multi-generational holidays** may lead to a demand for larger self-catering units, or clusters of units.

The borough is generally weak overall in the range of activities/ attractions as "things to do" and this should be a priority for future developments to enable potential to be fulfilled. However, the immediate surrounding areas are full high quality, well known attractions, countryside sties and places to visit. Day Visits are also heavily influenced by Visits to Friends and Relatives where customers are looking for a meal out along with undertaking outdoor activities, shopping and going to a visitor attraction or watching sporting events[12]. The central location in the country with good transport connections can make Rugby a great place to meet up with people from around England.

[12] [12] The GB Day Visitor Statistics 2015, Visit England

SECTION 5 OTHER FINDINGS FROM CONSULTATIONS DURING DEVELOPMENT OF DESTINATION MANAGEMENT PLAN

5.1 Key Findings from Online Business Survey

In addition to numerous one-to-one and small group consultations with businesses and organisations across the borough and neighbouring Destination Management Organisations, an online Business Survey was carried out during spring 2017, developed with the Council. The target audience was the breadth of businesses identified with the visitor economy in both town and countryside. The introduction to take part was sent to contacts via the Economic Development team, Visitor Centre, Museum and Art Gallery and Rugby First, with a link provided to a self completion online survey site.

After a month, a total of 24 responses were received, this is a disappointing number from potentially around 200+ businesses, however, it added to the overall consultation insight. Key findings are summarised here, with the full detailed report in Appendix E. For context of replies:

- All came from the central area between the M6 and A45/M45
- The responses are mainly from town centre BID members (79% were a member of Rugby Bid/Rugby First) so do not provide a full rounded opinion of tourism businesses from across the whole local authority
- Over a third (38%) described their business as an independent retailer, followed by restaurant/café/tea room/pub and estate agent, 13% respectively.

Marketing, print and digital media

Awareness of the resources available was mixed. Businesses were most aware of the www.rugbytowncentre.co.uk website (79%) and the Enjoy Rugby printed visitor guide (50%). There was a low level of awareness of other website resources including: www.shakespeares-england.co.uk (21%), www.enjoyrugby.co.uk and www.therugbytown.co.uk (33% respectively).

Over eight out of ten (83%) of businesses used their own website to promote and market their business. Use of social media such as Facebook, Twitter and Instagram was noted by 79% of businesses with a further 79% citing word of mouth/recommendation as their main marketing method. There was a low use of other local area tourism/promotional websites/social media with only 13% using this method for their marketing.

Image of Rugby

83% felt there was definitely a need to strengthen the image and branding of the Rugby area for visitors. Smaller numbers said yes a little (8%).

Customer base

Approximately four out of five customers are perceived to be local people (81%), and one in five (19%) as tourists/ non-locals visiting the area.

Approximately 63% of customers were felt to be repeat, and 37% new/first time to the business.

Times of Week/Year desire for an Increase in Business

Over half of all businesses would like to see an increase in their business during the weekday (54%) and in the winter months (50%). 46% would like more weekend and summer business – which would be good times for tourism leisure activity.

Actions to help the local visitor economy

Businesses felt that they would like to see more promotion of the town's retail, eating/drinking and events on offer (79%). The improved infrastructure of the town was a key action for almost two thirds (63%) citing this as an important action to help the local visitor economy.

54% commented on wanting to attract more visitors throughout the year, at quieter times; and 54% a better marketing and social media presence; and 54% to attract new developments and more places to visit. Half wanted to see more communication and local partnership in tourism.

Factors affecting business

The main factors that had affected their business during the last three years were competition from other providers/destinations and the cost of business rates and operations (42% each). The continuing austerity/spending less/belt tightening was an issue for 29%.

Business Optimism

Almost two thirds of businesses were quite/very confident (63%) compared with 17% who did not feel confident or optimistic about their business.

Development of urban and rural tourism in Rugby Borough

Business indicated a wide range of key priorities for developing urban and rural tourism in Rugby Borough. Not all comments reflect only tourism issues and thoughts, many priorities would influence the town and area as a destination for local people too. Suggestions include:

- Getting people into the town centres, not just out of town retail parks, free parking
- Reduce traffic congestion
- More shops in the town centre
- More to do, better venues
- Rugby is the home of Rugby Football, make more of this
- Proper coach park and promotion at trade shows for tourism
- More attractions
- Praise the great countryside with walks, canals and attractions.

Positioning Rugby for tourism

Businesses were asked where they felt Rugby should position itself in regard to tourism. Taking a stronger role of its own and building a local tourism partnership for Rugby was felt to be important in terms of positioning the area for tourism (32%). 41% of respondents felt that it was a combination of this and also working with other Warwickshire, Leicestershire and Northamptonshire destination organisations.

One quarter (24%) were interested in taking a more active role within a Rugby area tourism partnership group. One in six (18%) were willing to be part of a cross-business/site familiarisation event.

The full detailed report is in Appendix E.

5.2 Summary Feedback From Tourism Industry Workshop

On 4th April 2017, an invited audience participated in a half day workshop to begin to explore key issues and generate a sense of direction for the Destination Management Plan. The 29 people attending reflected a diversity of the visitor economy sector, including public authorities, commercial businesses, trade organisations and cultural societies. With some being unable to attend due to business operational issues, there was some under-representation by those from the smaller attraction and accommodation sectors and from canal boats.

Appendix A1 sets out the workshop attendees. The workshop took the form of an introduction and review of the borough, key strategic and product observations and an insight into the market intelligence, set out within this document. The following sections reflect upon group discussion activities that inform the content and direction of the final DM Plan.

A ‘word-cloud’ has been created of an A to Z of Rugby Borough from Tourism Workshop (with a few more ideas afterwards). Appendix F sets out the A to Z in full text format.

Appendix G is a SWOT Analysis generated by delegates about the Strengths, Weaknesses, Opportunities and Threats for tourism in Rugby.

5.3 Key Opportunities / Issues / Emerging Priorities

A group working session was then held, with each table of 7-8 people discussing for 15-20 minutes a topic, three in all, then moving onto the next topic, with a local authority moderator keeping the discussion going and on track, involving everyone. Using the prompts to keep the debate going, the key issues were noted and priorities identified. These are set out, in no specific order/priority.

Appendix H covers in more detail the topic prompts and other responses to the debated issues.

Topic A: Making Rugby Borough a more compelling place to visit

The top priorities & key actions to improve this included:

- **What is the USP?** Find it – tell it
- **Join up the rural/ countryside offer** - Package rural offer- Brandon, ancient woods, Coombe, Ryton Pools, Garden Organic, walking routes, cycle routes, villages, canals, Draycote Water
- **Package half day/ 1 day/ 2 days out packages and themes.** Show something different. Link with **Create themed Trails** such as Culture. Rugby. Countryside. Water.
- **Better shops, better hotels** – 'we all need to have a better offer' - link with experiences
- **Make more of the day visitor market** – work with the immediate access neighbours, better informed/ promoted to
- **Access for visitors** – not welcoming, 'no welcome mat', be more coach friendly, training welcome to taxi drivers - get boaters to visit, help them, 'Boris bikes'
- **Content and digital marketing** – clear offer, use social media
- **World class Rugby Art Gallery and Museum & World Rugby Hall of Fame** – partner with other leading attractions in surrounding area.

Topic B: Networking/ partnerships and familiarity with the Borough tourism product

The top priorities & key actions to improve this included:

- **Develop a brand and stick with it** – even for those who do not benefit directly , they will benefit form additional footfall
- **Connect the town with the borough and the 'out of town' with the town** – overcome the poor disconnection between urban, rural and different organisations and tourism businesses
- **Council or Rugby First** - Who is leading on doing more of the whole area marketing – beyond just the town centre? Rugby Borough Council to shout more loudly about the destination to local businesses – use of social media more
- **Set up a Tourism Partnership / define its remit** - run by RBC including a wide range of stakeholders including those with the right range of skills and experiences –not just a talking shop - what's it for, who does what? Key role for marketing of Rugby
- **Define a vision of the borough's visitor offer** – include guidelines to ensure consistency of message
- **Rugby School**- strong user of local companies – know each other better.

Topic C: Doing things smarter / Joining up the connections

The top priorities & key actions to improve this included:

- **Set up a Tourism Association –** run it free for 2 years, delivering easy wins to bind people in - do some down to earth activities – leaflet swaps, website, forum, links, e-newsletters, etc. With outward facing social media, and inward website to share info. And feed into others' sites
- **Workshops on good practice** - the importance of good service 'it's not Arkwright anymore!' - Welcome to Excellence programme courses/ training for front desk and managers
- **Create a database of tourism related businesses/ facilities**
- **Create 'Ambassador' type roles** – speak up for the town, borough and products and experiences – build upon good work of the BID with Ambassadors and rangers

- **Organise training / communication sessions** - aimed at satellite locations distant from the town centre – and with 'first contacts' eg taxi drivers, station staff
- **Piggy back on others – Rugby cannot do it alone -** work with Shakespeare's England, links with Coventry and NEC.

5.5 Other Key Issues and Opportunities

From the varied consultations, a number of other key issues and emerging opportunities have been considered, which include:

- **Rugby Town Centre Focused Partnerships and Initiatives** - lead with the town centre/ sporting heritage as the overall 'attack brand' at the core of the destination
- **Strength of "the birthplace of Rugby" USP** – World Rugby Hall of Fame is a positive addition alongside the Webb Ellis Museum and Rugby School
- But don't ignore **Presence and Identity of the Whole Borough** as a Destination – the rural areas count as a reason to visit, explore, stay longer
- **Strong rural Canal, Reservoir and Countryside Attributes** - for different audiences, special interest, drive many visits
- **Work on the links to Neighbours and Partnerships -** '**Cross-border' Tourism and Promotion Opportunities** - Shakespeare and Coventry /potential future City of Culture, Leicestershire and Northamptonshire
- **Potential for Hub and Spoke** role of Rugby working with surrounding local authority/destination areas, and gaining overnight staying visitors who may visit elsewhere in the day
- **New/changed Attractions** e.g. a new attraction linked to industrial/engineering heritage that is hands on family oriented? Some respondents noted there are not any rural attractions such as farm parks in the area
- **Promotion of "rugby package**" to sports and affinity group tours and playing sports clubs, linked with visits to Wasps in Coventry, Tigers in Leicester, Saints in Northampton, etc.
- **Niche/upmarket products and markets** – **Rugby School** and parents visiting the school and area - either for their own children, or attending inter-school competitions – sell them better area offer/ come back and stay longer. **Rugby Polo Club** (Onley) opened in 1893, the oldest and became one of the most prestigious clubs in the country. Similar to make clear the local offer.
- **Rugby Mast residential development site** and proximity to homes on the eastern edge of the town /borough. Potential recreation/ visitor attractive environment.
- **Oxford Canal** and its relationship with the new settlement development, and existing route past northern fringe of Rugby town.
- **Canal tourism** overall is significant but not nurtured, with poor connections, but opportunity for rural economy, visitors to explore villages, walks, trails, etc.
- **Attractive, but few, villages** in the borough, but limited promotion. Some strong stories, eg Dunchurch/Guy Fawkes
- **Lack of public transport** out to rural areas – affects businesses' recruitment and visitors ability to circulate to rural areas.

SECTION 6 SWOT ANALYSIS

A Strengths, Weaknesses and Opportunities Analysis (SWOT) has been developed, reflecting both town and country.

STRENGTHS

- Central accessible location
- Road and train transport networks
- Being the birthplace of sport of rugby
- Worldwide awareness of rugby as a sport
- Rugby Art Gallery and Museum high quality temporary exhibitions attract visitors
- World Rugby Hall of Fame
- Attractive historic buildings in town centre
- Distinctive feel of Regent Street/Albert Street "independents' quarter"
- Hillmorton Locks is the busiest canal flight in the country
- Pleasant countryside, canals, Draycote Water and reservoirs
- Coombe Abbey / Ryton Pools/ country parks
- Good base for travel to Stratford-upon-Avon, Warwick, Leicester, Coventry
- Business tourism linked to strong business base of major organisations
- RBC sees Tourism as a Corporate priority
- Presence of major hotel chains

OPPORTUNITIES

- International interest in rugby game. Japan, Europe, S Africa, Australasia
- Proximity to major league rugby clubs Wasps, Tigers, Saints – attract local club visits
- "The rugby package". Tours inc Hall of Fame, School, Webb Ellis Museum, Pathway of Fame, Rugby RFC / group tours for rugby package
- Group tours with neighbouring local authority areas for themes eg literary
- Redevelopment of Rugby Art Gallery and Museum to create a permanent social history gallery
- Stop off for groups travelling through
- Weekend leisure breaks rugby/ independent shopping/ café culture / historic town
- Good base for short breaks touring region
- Shape the image as a heritage town –characters, including Guy Fawkes, Whittle
- Growth in Rugby's resident population – market for new family oriented attractions. Visits from Friends and Relatives (VFR)
- Central location with good rail links to London, Birmingham airport, cities
- Encourage canal boaters to stop and explore at points throughout borough
- Build on festivals and events
- Town Centre/ street environment/ signage regeneration
- Business tourism – Coventry does not have enough bedstock, forge better links
- Build a relationship with Elliott's Field for cross-promotion, attract their shoppers
- Promote "Experiences not products"
- Coventry City of Culture 2021 (poss)

WEAKNESSES

- Being the birthplace of rugby game - not to everyone's interest. What else to see/do?
- Feeling of decline in town centre – void units – and shift to Elliott's Field retail park
- Lack of critical mass of attractions/things to do in town/borough attracting non-locals
- Unclear for visitors whether/when they can tour Rugby School. School museum invisible
- Entrance to Webb Ellis Museum
- Weak relationship between tourism businesses and RBC
- Little networking between tourism businesses
- Disconnect between town centre and rest of borough businesses
- Not yet has full business awareness/ support for new "The Rugby Town" brand
- Need for coherent tourism branding
- Little destination marketing material/ budget
- Disjointed approach to destination development across different RBC functions and Rugby First
- No tourism structures giving vision and synergies
- No (few) linkages made between canal and its visitor economy potential – town and rural
- Limited promotion of rural tourism offer
- Poor signage station to town
- Poor transport links to rural areas
- Lack of coach parking in town

THREATS

- Admission charge to Hall of Fame affecting visitor numbers/business operation
- Lack of wider marketing of Hall of Fame to external audiences
- Town centre footfall down >25% in 2016 so "missing the buzz" – and continuing
- Lack of ownership/drive to make a strong tourism product of the destination
- Failing to aim high enough
- Failure to join town and rural tourism sector leaving a piecemeal sector
- Lack of active partnership between RBC, Rugby First, Rugby School, Webb Ellis

SECTION 7 THE DESTINATION MANAGEMENT PLAN 2017-2020

7.1 Action Plan

The first Rugby Destination Management Plan spans 2017/18 through to 2019/20, enabling it to fit the Rugby Borough Council timeframes for both its Corporate Strategy and Town Centre Action Plan.

This Destination Management Plan sets the direction for tourism growth across the Borough. The approach seeks to:

- Retain and enhance the engagement and commitment of local businesses with Rugby Borough Council, Rugby First, Warwickshire County Council and other stakeholder organisations to enable them to work jointly to deliver the Plan
- Increase the value and volume of the visitor economy in Rugby town centre and across the borough through targeted actions
- Set out opportunities for inward investments and individual businesses to enhance the tourism product and profile across the borough
- Highlight priorities for public sector investment, connecting with existing initiatives and funding programmes
- Connect to other relevant strategies and action plans which can deliver elements of the tourism priorities.

7.2 Vision

Rugby will be recognised as a distinctive heritage town within Warwickshire, celebrated as the birthplace of the sport of rugby; attracting new visitors and encouraging their exploration of the borough's attractions and countryside, thus boosting the local economy.

7.3 Aim of the Destination Management Plan

To grow the local visitor economy by establishing strong partnerships between town and rural operators to deliver agreed actions, and working with neighbouring destination partners to deliver shared priorities.

7.4 Core Objectives

A number of Core Objectives set the context for the Plan to make tangible impacts over time. To**:**

1. **Raise the profile and connected tourism offer of the Rugby area as a compelling place to visit**
2. **Increase economic benefits of tourism across the borough through resilient businesses and organisations**
3. **Strengthen delivery structures and the working relationship between organisations and businesses involved across the visitor economy**
4. **Support those involved in the visitor economy to be more familiar with the town and rural area products and visitor opportunities**
5. **Enhance the visitor experience, quality and connected infrastructure underpinning the tourism destination.**

These core objectives will be delivered through four focussed Strategic Themes to drive forward the first three year Destination Management Plan.

7.5 Strategic Themes

Four headline Strategic Themes focus efforts upon key areas of activity through Priority Actions that can make an impact in the first three years:

A Building an Identity and Brand for Rugby as a whole Destination

B Developing Partnerships and Networks for Success

C Outward Facing Marketing

D Delivering a Quality Destination

The Action Plan is set out in detail on the following pages, followed by the process of delivery of the Destination Management Plan and its Actions.

Legend:

RBC	Rugby Borough Council
Comms	Communications team
EIO	Economic Investment Officer
SMT	Senior Management Team
SVSA	Senior Visitor Services Assistants
TTCTL	Tourism & Town Centre Team Leader

CRT	Canal and River Trust
C&W Growth Hub	Coventry & Warwickshire Growth Hub
DMPs	Destination Management Partnerships
EAFRD	European Agricultural Fund for Rural Development
FSB	Federation of Small Businesses
RF	Rugby First
RFU	Rugby Football Union
WCC	Warwickshire County Council
Warwks VEF	Warwickshire Visitor Economy Framework

H,M,L	High, Medium, Low

Rugby Destination Management Plan 2017-20: Priority Actions

STRATEGIC THEME A: *Building an Identity and Brand for Rugby as a whole destination*

Priority Actions Ref	**Action**	**Priority** H, M, L	**Year/ Timescale** 2017/18, 18/19, 19/20	**Level of resource** H, M, L	**Lead agency**	**Partners**	**Link to Core Objectives**	**Cross link to Warwks VEF**
A1	Position the tourism identity and brand of Rugby as **a whole borough destination with a heritage town at its core** to capitalise on key strengths and attract the broader potential visitor market	H	2017/18	M- H	RBC – all functions	WCC, RF, businesses	Obj 1 Obj 2 Obj 4	Priority 1 Compelling
A2	Work with brand agency to **evolve the brand reflecting the values, attributes and identity of the heritage/ sporting town within accessible rural setting**	H	2018/19	M- H	RBC (TTCTL)	WCC, RF	Obj 1 Obj 4	Priority 1 Compelling
A3	Produce a suite of resources, brand identity kit to be used by partners, businesses, etc which reflect Rugby as a heritage destination for tourism promotion	H	2017/18 2018/19	M	RBC (TTCTL/ Comms)	WCC, RF, businesses	Obj 1 Obj 2 Obj 3	Priority 1 Compelling
A4	Create brand relationship /comparator positioning with other Midlands regional heritage towns to re-position the town as somewhere to consider (and make) a visit	M	2018/19	L	RBC (EIO)	WCC, RF	Obj 5	Priority 1 Compelling
A5	Strengthen links with Warwickshire Town Centres group and heritage tourism partnerships, not just retail and regeneration	M	2017/18, 2018/19, 2019/20	M	RBC (TTCTL/EIO)	WCC, RF	Obj 2 Obj 3	Priority 1 Compelling Priority 3 Extend Benefits
A6	Explore potential application for Historic England Heritage Action Zone status and intervention to boost town centre. Deadline for next round is 7 August 2017	H	2017/18	M-H	RBC/WCC (EIO)	RF	Obj 5	Priority 1 Compelling
A7	Re-arrange the display of attractions/destination marketing materials within the Visitor Information Centre to better highlight more 'Things to do' in Rugby. To include activities across the borough, focussed on activities /events likely to be of interest to day/staying visitors rather than just the local population	M	2017/18	L	RBC (SVSA)		Obj 1 Obj 4	Priority 1 Compelling

Cross link to Warwickshire Visitor Economy Framework: Priority 1 Creating Compelling Places to Visit; Priority 2 Building Private Sector Marketing Capacity; Priority3 Extending the Benefits of Tourism.

STRATEGIC THEME: B ***Developing Partnerships and Networks for Success***

Priority Actions Ref	Action	Priority H, M, L	Year/ Timescale	Level of resource H, M, L	Lead agency	Partners	Link to Core Objectives	Link to Warwks VEF
B1	Develop a **'Rugby Tourism Network'** as a **first step destination partnership group** to share the vision and direction of the Destination Management Plan. Over time the remit of group may evolve towards a destination management organisation	H	2017/18	L	RBC (TTCTL with EIO & SVSA)	WCC, RF Businesses, FSB	Obj 3 Obj 2 Obj 4 Obj 5	Priority 1 Compelling Priority 3 Extend Benefits
B2	Create management team to oversee the delivery of the Destination Management Plan comprising RBC, WCC and external organisations and businesses	H	2017/18	L	RBC (TTCTL)	WCC, RF Businesses, FSB	Obj 3	Priority 1 Compelling
B3	Ensure the RBC Tourism & Town Centre Team Leader has the resource and budget to take the lead in developing and delivering actions and relationships across the borough within DM Plan, with politicians' buy-in	H	2017/18 Ongoing 2018/19, 2019/20	H	RBC – Head of Growth & Investment/ SMT	WCC, RF Businesses, FSB	Obj 3 Obj 2	Priority 1 Compelling
B4	Explore potential to create core themed Rugby Tourism Network subgroups to drive forward agendas either by: - **Core Target Markets** e.g. Heritage Explorers, Families, Short breaks, Business; or by **Product Theme** e.g.: -Hotels/Conferencing ; -Smaller accommodation/self catering -Attractions/ events/ activities -Retail / hospitality -by linking Rugby First with other borough area commercial/ retail/hospitality businesses	M	2017/18 Ongoing	L	RBC (TTCTL with EIO & SVSA	WCC, RF, businesses	Obj 3 Obj 4 Obj 5	Priority 1 Compelling Priority 3 Extend Benefits
B5	Strengthen destination partnerships & relationships where appropriate with neighbouring authorities/ destination organisations for mutually beneficial collaboration/ marketing /product development etc. e.g.: -Warwickshire County Council – countryside activities/ market towns/ events -Shakespeare's England – leisure marketing/ packages - Leicester Shire Promotions – leisure marketing packages -Coventry/Visit Warwickshire – business/ conference -Nuneaton & Bedworth, North Warwickshire, Daventry – explore/waterways/ A5/ literary itineraries	M	2018/19, 2019/20	L-M	RBC (TTCTL)	Local authorities, DMPs, Canal & River Trust, etc	Obj 1 Obj 3	Priority 1 Compelling Priority 2 Marketing Priority 3 Extend Benefits
B6	Consult the CWLEP Culture & Tourism Board to explain the synergies between this DMPlan and their strategy and explore the potential support the CWLEP may be able to offer	H	2017/18	H	RBC (TTCTL/ EIO)	-	Obj 1 Obj 3	Priority 1 Compelling

Cross link to Warwickshire Visitor Economy Framework: Priority 1 Creating Compelling Places to Visit; Priority 2 Building Private Sector Marketing Capacity; Priority3 Extending the Benefits of Tourism.

STRATEGIC THEME: C *Outward Facing Marketing*

Priority Actions Ref	Action	Priority H, M, L	Year/ Timescale	Level of resource H, M, L	Lead agency	Partners	Link to Core Objectives	Link to Warwks VEF
C1	Enhance www.therugbytown.co.uk website, updating its layout and content to benefit tourists/visitors, not just locals so that it: - encompasses the whole borough as a destination and reflects the sense of Rugby as a heritage town amidst attractive countryside - is tourism led, and less 'civic', 'local authority' and 'town centre' in style - presents Rugby's tourism products through a user friendly, enticing and visually strong resource to highlight the interesting and unique experiences on offer - has consistent branding with other marketing collateral -removes the confusion of branding as both "the rugby town" and "Rugby town centre"	H	2017/18	L-M	RBC (TTCTL/ Comms)	RF, tourism businesses	Obj 1 Obj 2 Obj 5	Priority 2 Marketing Priority 3 Extend Benefits
C2	Draw together the town centre focused marketing activity, website and printed literature led by Rugby First with the town wide and rural borough tourism destination materials to create a clear and seamless information source for visitors	H	Create 2017/18, use for 2018/19	M	RBC/ RF (TTCTL/RF)	Businesses	Obj 1 Obj 5	Priority 2 Marketing
C3	Set out a **Destination Marketing Strategy** for the whole borough, a focused follow on plan to this DM Plan, reflecting key target markets eg group visits & families, growth opportunities, 'low hanging fruits/early wins' and breadth of key markets, channels, reach and benefits	H	2017/18	M-H	RBC/ WCC (TTCTL)	All involved in tourism	Obj 1 Obj 2,3	Priority 2 Marketing Programme 6 Advocacy Intelligence
C4	Create a new visitor guide developed as a tool to benefit tourists, first time visitors and all encompassing of the town and borough. Ready for spring 2018	H	Create 2017/18, use for 2018/19	M-H	RBC (TTCTL/ SVSA)	RF	Obj 1	Priority 1 Compelling Priority 2 Marketing
C5	Create and implement a marketing strategy for the World Rugby Hall of Fame attraction refining the engaging website and marketing material to reflect current best practice for attractions marketing.	H	2017 for 2018 season	M	RBC (TTCTL /Arts, Herit-age & Visitor Services Manager)	World Rugby	Obj 1	Priority 1 Compelling Priority 2 Marketing

Priority Actions Ref	Action	Priority H, M, L	Year/ Timescale	Level of resource H, M, L	Lead agency	Partners	Link to Core Objectives	Link to Warwks VEF
C6	Use existing intelligence to better understand current customers; shared collation of partner business/ organisations' postcodes, existing market profiles, socio-demographic studies, audience data etc. Use of Audience Agency/MOSAIC/ Arkenford etc postcode analysis	M	Create 2017/18, use for 2018/19	M	RBC (TTCTL/EIO)	All involved in tourism	Obj 2 Obj 4	Priority 2 Marketing (Programme 6 Advocacy & Intelligence)
C7	Develop relationship and packages/ discounts with Elliott's Field and regional rugby sports clubs to build upon existing markets and affinity groups already coming to make early inroads into attracting easier to reach target audiences	M	Create 2017/18, use for 2018/19	L-M	RBC/ RF (TTCTL/ SVSA)	World Rugby, RFU, RF	Obj 1 Obj 2, 4	Priority 1 Compelling Priority 2 Marketing
C8	Undertake new market research to fill identified gaps – e.g. borough wide visitor survey – understand locals/ day visitor/ tourist / new/ repeat, regular etc visitors, motivations, actions, cross-visiting to products /sites within the borough and beyond, etc.	M	2018/19	M-H	RBC (EIO)	RF	Obj 2	Priority 2 Marketing (Programme 6 Advocacy & Intelligence)
C9	Test external perceptions/ awareness of the town and destination as a tourist potential place to visit	L-M	2018/19	M-H	RBC/ WCC (EIO)	RF	Obj 2	Priority 2 Marketing (Programme 6 Advocacy & Intelligence)
C10	Link with key destination partners to achieve greater promotion of the borough, connected to key opportunities, e.g. rugby sport packages/ tours, half day/ day/tour trails, countryside, waterways, heritage towns, Coventry City of Culture, etc. Suggested themes for partnerships are set out at Action B5.	M-H	2018/19	L-M	RBC (TTCTL)	WCC, Shake-speare's England , Visit Coventry etc	Obj 1 Obj 3	Priority 1 Compelling Priority 2 Marketing
C11	Countryside and Waterways Explorer promotion. To connect the area with the surrounding districts and easy accessible rural routes, canal towpaths, rural attractions and environmental destinations and events	L-M	2018/19, 2019/20	M	RBC (TTCTL)	WCC, EAFRD, CRT	Obj 1 Obj 3	Priority 2 Marketing Priority 3 Extend Benefits
C12	Undertake follow up Tourism Economic Impact Survey to identify changes in volume, value, employment	L	2019/20	L	RBC (EIO)	WCC	Obj 2	Priority 3 Extend Benefits (Programme 6 Advocacy & Intelligence)

Cross link to Warwickshire Visitor Economy Framework: Priority 1 Creating Compelling Places to Visit; Priority 2 Building Private Sector Marketing Capacity; Priority3 Extending the Benefits of Tourism.

STRATEGIC THEME: D ***Delivering a Quality Destination***

Priority Actions Ref	Action	Priority H, M, L	Year/ Timescale	Level of resource H, M, L	Lead agency	Partners	Link to Core Objectives	Link to Warwks VEF
D1	Across partners and businesses improve product awareness of front line staff and management to be more familiar with the town and rural area products in order to cross-promote and enhance visitor information and ability to explore the area. Include familiarisation trips/ guided walks around town, mini-bus trip out to rural venues.	M	2018/19	L-M	RBC / WCC (SVSA)	RF, all tourism businesses	Obj 4 Obj 1	Priority 1 Compelling Priority 3 Extend Benefits
D2	Put in place improved arrangements through practical improvements to form a Coach Parking Plan to encourage coach tour drivers and boost group visits to the town centre in particular	M	2018/19	L-M	RBC / WCC (EIO/RF/Other RBC functions)	RF	Obj 5 Obj1	Priority 1 Compelling
D3	Support core businesses to invest and improve product, particularly town accommodation providers and rural attractions in order to optimise the quality and appropriateness of places to stay and visit as the destination promotes itself more.	M	2018/19	L	RBC (EIO)	FSB, WCC Invest In Warks, CWLEP, C&W Growth Hub	Obj 2	Priority 1 Compelling
D4	Work with, input into requirements, and benefit from investment in the town centre street environment/ regeneration planned improvements. Ensure that these reflect the heritage destination aspiration of the town. Ensure good waymarking installed for walking route between Rugby station and the town centre.	M	2018/19	M	RBC (TTCTL)	RF	Obj 5	Priority 3 Extend Benefits
D5	Put in place customer care and service training to develop the visitor welcome. Recruit Ambassadors for Rugby town and borough. Broaden Town Rangers' knowledge of tourism product using Welcome to Excellence style training and familiarisation visits across the borough.	M	2018/19	M	RBC/ RF (SVSA/RF)	Tourism businesses	Obj 4 Obj 3	Priority 3 Extend Benefits
D6	Enhance the promotion of and use of public rights of way network, walking routes into and around the Rugby countryside, trails, towpaths, etc. Work in conjunction with WCC Countryside Services, Canal and River Trust, Draycote Water, etc. Identify routes needing improve-ments, additional signage, stiles, online guides, etc	M	2018/19	M	WCC/ RBC (WCC Country Parks/ TTCTL)	WCC, CRT, EAFRD	Obj 3 Obj 1, 5	Priority 3 Extend Benefits

Cross link to Warwickshire Visitor Economy Framework: Priority 1 Creating Compelling Places to Visit; Priority 2 Building Private Sector Marketing Capacity; Priority3 Extending the Benefits of Tourism.

Priority Actions Ref	Action	Priority H, M, L	Year/ Timescale	Level of resource H, M, L	Lead agency	Partners	Link to Core Objectives	Link to Warwks VEF
D7	Through existing schemes and development of tailored events, provide business support, training, skills, social media training/ benefits for small businesses	L	2018/19	L-M	RBC (TTCTL/EIO)	EAFRD C&W Growth Hub	Obj 2	Priority 3 Extend Benefits
D8	Improve further education and employment opportunities in hospitality and tourism, working with Warwickshire College to promote tourism and culture sector as a career opportunity, work placements, training, internships, etc.	L	2018/19	L	RBC (TTCTL/EIO)	College CWLEP Skills	Obj 2	Priority 3 Extend Benefits
D9	Develop the potential for events and festivals and enable better connections with rest of the visitor economy, working with the lead organisers, to increase promotion, strengthen links to accommodation providers, transport operators, etc. Assist local events and groups to develop more events across the town and country venues	L	2018/19	M	RBC (TTCTL/SVSA /. Arts Officers)	Events groups, events venues eg Draycote Water, businesses	Obj 3 Obj 5,1	Priority 1 Compelling Priority 3 Extend Benefits
D10	Work with public transport providers to ensure rural public transport opportunities provide maximum connectivity for visitors from railway station/ town centre gateways to and from key rural attractions, villages and centres of visitor economy employment	L	2019/20	L-M	WCC	RBC	Obj 5	Priority 3 Extend Benefits
D11	Work with Invest In Warwickshire to attract new tourism attractions/expansion to Rugby borough	M	Ongoing	L	WCC	RBC (EIO)	Obj 5	Priority 1 Compelling
D12	Work with RBC Planning team to ensure sites for tourism attractions are available with the Local Plan/Core Strategy. Currently there is under provision considering the population growth	M	Onoging	L	RBC (EIO)	-	Obj 5	Priority 1 Compelling
D13	Consider a feasibility study for an industrial heritage attraction/experience based on the town's national strength rail and engineering history.	M-L	2018/19	M	RBC (TTCTL)	Network Rail, Cemex, GE, Heritage organisation s	Obj 5	Priority 1 Compelling

Cross link to Warwickshire Visitor Economy Framework: Priority 1 Creating Compelling Places to Visit; Priority 2 Building Private Sector Marketing Capacity; Priority3 Extending the Benefits of Tourism.

SECTION 8 FUNDING AND DELIVERY

8.1 Delivery of the Action Plan

The Action Plan for the Destination Management Plan takes a realistic approach to delivering Rugby's aspirations and potential in the context of continued constraints on public sector budgets and a largely unconnected tourism sector. It forms a working checklist of projects, activities and priorities for the partners to deliver against and monitor progress.

Resourcing
A number of linked and standalone actions within the 4 Strategic Themes will contribute to successful delivery of the DM Plan. Rugby Borough Council is identified as the lead agency on nearly all actions, however individual actions may be led by different officers and departments as indicated**.**

The new Tourism and Town Centre Team Leader role (recruited spring 2017) will have the pivotal role in driving delivery of actions and building a renewed, strong relationship with tourism sector businesses and assisting co-ordination across the Council's tourism – related functions. The Economic Investment Officer and Senior Visitor Services Assistants (the latter working from the Rugby Art Gallery & Museum/ Visitor Centre) should also be key in strengthening these relationships and will lead on specific actions. In effect this represents a dedicated core of tourism focused personnel, working to deliver the new Destination Management Plan.

Promoting the new World Rugby Hall of Fame and increasing visitor numbers undoubtedly must be a priority for the Council due to the level of capital and revenue investment made into the flagship attraction. However, this must not divert attention away from the 'bigger picture' of growing the overall volume of tourism connections and economic benefits by establishing a strong Rugby Tourism Network of businesses and stakeholders from across the area.

In addition to the staff resource some limited revenue funding should be made available where actions demonstrate delivery of RBC's priorities. Further funding **may** be available from working with WCC and the LEP by establishing projects that can deliver against these organisations' programmes, budgets and outputs across the sector.

The initial actions that should be taken forward with early 'quick wins' as initial priorities are set out below. These have been selected as they are building blocks of successful delivery of the overall Plan and relate back to the first year/s High Priorities.

Early Quick Win High Priority Actions

Priority Actions Ref	Action
A2	Engage a brand agency to consult borough and neighbouring area tourism businesses, destination organisations and communities, to **evolve a brand reflecting the values, attributes and identity of the heritage/ sporting town within accessible rural setting**
A3	Produce a suite of resources, brand identity kit to be used by partners, businesses, etc which reflect Rugby as a heritage destination
A6	Explore application for Historic England Heritage Action Zone status and intervention to boost town centre. Deadline for next round is 7 August 2017
B1	Develop a functioning **'Rugby Tourism Network'** as a destination partnership group to share the vision and direction of the Destination Management Plan. Over time the remit of this group may evolve towards a destination management organisation.
B2	Create management team to oversee the delivery of the Destination Management Plan comprising RBC, WCC and external organisations and businesses

C1	Enhance www.therugbytown.co.uk website, updating its layout and content to benefit tourists/visitors, not just locals so that it: - encompasses the whole borough as a destination and reflects the sense of Rugby as a heritage town amidst attractive countryside - is tourism led, and less 'civic', 'local authority' and 'town centre' in style - presents Rugby's tourism products through a user friendly, enticing and visually strong resource to highlight the interesting and unique experiences on offer - has consistent branding with other marketing collateral -removes the confusion of branding as both "the rugby town" and "Rugby town centre"
C3	Set out a **Destination Marketing Strategy** for the whole borough, reflecting key target markets eg group visits & families, growth opportunities, 'low hanging fruits/early wins' and breadth of key markets, channels, reach and benefits
C4	Create a new visitor guide developed as a tool to benefit tourists, first time visitors and all-encompassing of the town and borough. Ready for spring 2018
D1	Improve product awareness of front line staff and management to be more familiar with the town and rural area products in order to cross-promote and enhance visitor information and ability to explore the area. Include familiarisation trips/ guided walks around town, mini-bus trip out to rural venues.

8.2 An Evolving Approach for Partnership and Delivery

Throughout the consultations a series of approaches were considered for evolving models and partnerships to create a stronger relationship between organisations involved in managing and delivering the visitor economy in the Rugby area. With the positive redefining of tourism roles by Rugby Borough Council within the Economic Development and Visitor Centre departments, the start of a phased step-by-step approach has begun.

The following reflects the most realistic method of building a **Rugby Tourism Network** in the early years, during this initial three year DM Plan timescale 2017- 2020. It takes a realistic 'softly softly' approach, rather than attempting to create a public-private-third sector membership based Destination Management Organisation of partners who do not yet have a shared identity, or common direction of travel.

The leadership and secretariat provided by the RBC officers to the Rugby Tourism Network will enable the destination partnership group to share the vision and direction of the Destination Management Plan. The driving force will be through RBC, working with Warwickshire County Council, Rugby First and other neighbouring destinations to enable this sense of Rugby to grow as a visitor destination. A stronger tourism partnership may evolve over time, taking forward the agenda, alongside Rugby Borough Council.

Building on the recent years' work in regenerating and strengthening the town centre, the development of the Council led approach will focus on the tourism of the whole area, not just town centre. The heritage town and birthplace of the sport lie at the heart of the 'attack brand' and will be core to the approach to build the urban and rural partners.

- In order to demonstrate that the tourism industry has adopted and supported the DM Plan, the Rugby Tourism Network should become a private-sector/trade led tourism organisation supported by RBC, with a Chair that is non-political, nor from the public sector
- Whilst the Network is unlikely to hold executive powers at the outset, and has no budget to direct, it should positively seek to build awareness of and participation in the network and set the direction of tourism growth with the local industry and partners. The areas of activity will reflect the DM Plan Objectives and Strategic Themes
- It will act as a contributor, advisory board and trade voice to input towards the needs of the sector that are then reflected in the outputs of RBC through online, digital, printed guide and Visitor Centre information, attendance at tourism events, etc.

Stronger links will be developed by RBC Officers and the Tourism Network with Warwickshire County Council Tourism team, Countryside and Heritage Services, Highways, etc. The links with County's strengths in countryside, public rights of way, events, market towns, information, etc. and associated funding will be nurtured and strengthened.

Relationships between RBC visitor economy team will be developed with neighbouring Shakespeare's England, Visit Coventry & Warwickshire (Coventry City Council), as well as the local authorities of Nuneaton/ Bedworth, North Warwickshire, Hinckley & Bosworth, Harborough, Leicestershire, Daventry, Northamptonshire and Leicester Shire Promotions. Appropriate marketing, product development, packaging, funding bids and other opportunities will be pursued where they benefit the area of Rugby borough and its fuzzy boundaries, supporting tourism businesses and the local economy and communities.

At the local level, Rugby DRIVE is an initiative inspired by local entrepreneurs coming together with the Coventry & Warwickshire LEP Growth Hub and other partners. This is something unique to Rugby, focused on enabling businesses to get plugged into the support and opportunities that will help them and the local economy to grow. It could provide links to the emerging Tourism Network partnership.

8.3 Potential Funding Streams

8.3.1 Potential funding to Deliver Elements of the Plan

Whilst the core role of the Destination Management Plan is to provide a framework and direction for tourism activity across the borough, delivery of some aspects requires budgets over and above staff time. The defined operating budgets through Rugby Borough Council's support will likely be limited beyond the core personnel involved in the sector and the operating costs of the existing Visitor Centre facility. Given the significant investment made in the World Rugby Hall of Fame it would be wise to back that up with revenue funding to support the development of the tourism sector through closer working between businesses to grow the value of Rugby's visitor economy. Other funding will be sought from available programmes towards capital projects and activities. Potential channels for funding include:

Coventry & Warwickshire Local Enterprise Partnership (CWLEP) - European Structural and Investment Fund (ESIF) Strategy 2014-20; notes the role of Destination Management Organisations in supporting growth and makes reference to "tourism support will be delivered through the SME competitiveness priority of the structural funds." Hence sharing the Rugby Destination Management Plan with the Tourism & Culture Board of the LEP will enable a better appreciation of the issues, opportunities and economic/ employment benefits that may arise and the LEP might be encouraged to offer some funding for a Rugby project.

The **European Agricultural Fund for Rural Development (EAFRD)** can support specific rural business-focused actions identified in emerging destination management plans or other strategically important tourism projects. However, so far, it seems that this would not be available to Rugby town. Further details on a possible Tourism Cooperation Call for bids via the LEP will provide direction to possible projects and bidding.

Other potential projects might be:

- A 'visit local' promotional scheme via WCC to engage county/near neighbours to better find out about and visit the Rugby area
- Infrastructure investment in connections and circulating visitors – eg signage, cycleway routes including the Lias Line, links between the canal/marinas and settlements/visitor attractions and amenities, etc.
- Investment into interpretation and visitor information in key villages across the borough, to provide more for visitors to discover about the historic settlements.

Consideration also needs to be given to funds that may already be available to bodies in Rugby such as RBC, Rugby First and how these might be used to best effect. This needs to be investigated further in the next phase of delivery of the project by officers.

Spacehive funding platform www.spacehive.com/movement/warwickshire-together/about

'Warwickshire Together' is Warwickshire County Council's online forum for local projects seeking crowd-funding towards creating and delivering schemes on the ground. Spacehive provides a single portal where people with project ideas can build support from their community, ensure their plans are viable, pitch for funding from the crowd and partners at the same time, and share the impact they created. For the councils, companies and grant makers that partner with Spacehive it is a powerful way to attract, support, and showcase projects they love.

Warwickshire County Council wants to see the county's towns grow and be vibrant communities supporting the local economy; hence connecting project ideas to the people, councils, companies and grant-makers ready and willing to fund them. Key areas of interest are - Parks & Gardens; Arts & Culture; Buildings, Streets & Infrastructure; and successful projects should have - Helped the environment; Boosted the economy; Increased volunteering, jobs & education; Supported arts, culture & heritage; and Promoted activity & leisure. Future Rugby projects could use this vehicle to communicate to broader audiences of potential supporters.

Discover England Fund (DEF)

This fund, handled by Visit England, aims to stimulate a competitive tourism industry with bookable product offering quality experience which meet consumers' demands. The deadline has passed for Expressions of Interest in Year 2/2017 of the programme. **Year 3 for 2018/19 should have £22 million available**. During year 2 funding for projects up to £250,000 (20% match funded) was available for:

- Developing thematic and/or geographic clusters/groupings of bookable product
- Itinerary and experience development
- Integrated transport solutions/options e.g. regional gateway development, work with transport operators, digital travel planning and through-ticketing
- Content and collateral in support of the above
- Technology to support the above (however, some restrictions on booking platforms, websites and apps)
- Product/market testing
- Pricing products
- International product distribution through existing channels and solutions
- Travel trade education and engagement
- International promotion (e.g. consumer marketing campaigns, press trips, tactical marketing with partners and PR activity) though this should not be the main focus of the project and, if proposed, should be delivered towards the end of the project once the product is developed
- Project delivery (including additional staff required to run the project).

Clearly many of these themes are applicable to Rugby borough and the possibility of a Year 3 application needs to be investigated further, although the organisation may not be geared up for this in the timescale. It does need to be borne in mind that Visit England will also be reviewing priorities and allocations in the light of progress in Years 1 and 2 of the fund.

Marketing Birmingham and Shakespeare's England are already delivering/ applying for this DEF funding in relation to canals packages for overseas visitors and there may be the potential for Rugby to engage with these. A canals/waterways related project has been carried out in Birmingham/ Warwickshire for year one, with a national year two bid that could benefit Rugby' operators and destinations.

8.3.2 Funding for Individual Tourism Businesses /Community Projects

Until the end of 2017 businesses in the rural parts of the borough are eligible for EAFRD grants through the **RDPE Growth Programme for rural tourism infrastructure**. As there is scope for more tourism attractions and self-catering accommodation in the area businesses should be encouraged to apply.

Warwickshire County Council, Growth Fund Small Capital Grants, 40% intervention maximum, **available to individual businesses** https://apps.warwickshire.gov.uk/api/documents/WCCC-688-255

Coventry and Warwickshire Re-Investment Trust are delivering the small loans to business programme. Loans of between £1,000 to £50,000 are available. http://cwrt.uk.com/existing-businesses/

New and existing businesses can access a variety of funds through the **Coventry and Warwickshire Growth Hub** one-stop shop.

Other community/ heritage sources include:

Heritage Lottery Funds programmes such as **Heritage Grants** and **Heritage Resilience** might be considered for specific larger projects.

CEMEX's Community Fund makes grants ranging from £1,000 to £15,000 to projects which improve or enhance local community facilities and places of interest, primarily within the areas of conservation and heritage.

8.4 Potential new Developments and Locations

Consultations have not revealed many planned new tourism developments within the borough. Dunchurch Pools Marina will be open later in 2017. There is a planning application for "Yum Yum World" in the former M&S retail unit in the town centre – to create a chocolate museum, 'marshmallow canyon' and 'sweet forest', with a giant chocolate fountain, sweet factory, shop, soft play area and Laser Quest venue.

The Coventry City of Culture, Ricoh Arena and Daventry Canal Arm and Boat lift are within the tourism sphere of influence and possibly also Merlin Group's "Project Thor" at the NEC**. Invest in Warwickshire** is not aware of any major tourism or leisure enquiries for the area, however they do report a small number of requests for assistance from local businesses to grow in that sector looking for affordable units.

The **Diversification of farms** and rural businesses presents opportunities for tourism and leisure businesses to be developed. Within u**rban development locations**, amidst the new development in Rugby there are 2 potential sites suitable for tourism/leisure developments. Firstly, potentially linked to the **Houlton Radio Station site** and also at the **Leicester** Road plots in the town. http://houltonrugby.co.uk/ is a housing-led development with community facilities by Urban and Civic with Aviva Investment Partners. 6,200 homes will be created set within 1,200 acres of open space. Dollman Farm has opened offering a café, community centre and visitor centre. **Ansty Park** Junction 2 and **Rugby Gateway** will see more business sites, with potential growth in the business tourism markets.

Inward Investment and Planning functions and strategies at both Rugby Borough Council and Warwickshire County Council should seek to enable the development of new tourism attractions in the borough.

8.5 Performance Measures

Nationally, Visit England has set a target of 5% annual growth in tourism revenue between 2010 and 2020. On the basis that Rugby borough appears to be have a modest share of the total tourism volume, value and product within Warwickshire as a visitor destination, this is a fair target for Rugby to seek to achieve. Thus a 3% to 5% year-on-year growth is considered an overall target for the borough, with specific localised performance, eg of key visitor attractions, that may individually surpass this.

Such visitor volume, value and employment might be measured through the Economic Impact studies advocated in the action plan, with a future impact assessment after the initial three year DM Plan.

Progress should also be measured by:

- Monitoring delivery of the Actions within this Plan, their achievements, and longer term outcomes. Use of an annual review with Red, Amber, Green traffic light system to monitor progress
- The number of visitors to visitor attractions and events. Using the baseline data in this report and collected annually from businesses, extending the range of partner businesses that provide such performance data
- Collecting accommodation occupancy rates. Based on data from a sample of local businesses, to retain a core regular monthly/quarterly update from as a minimum, key national operators
- Surveys of local businesses, using the essence of the Tourism Business Survey used during the consultation phase.

Volume 2 provides the Evidence Base Appendices.

A DESTINATION MANAGEMENT PLAN
& PARTNERSHIP 2017- 2020
for
RUGBY BOROUGH COUNCIL
and PARTNERS

VOLUME 2 EVIDENCE BASE APPENDICES

July 2017

A Meredith Associates

with

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Contents

APPENDIX A Rugby Destination Plan Development Consultees
– by one-to-one meeting, small group meeting, telephone

represents those also attending the Visitor Economy Sector Workshop April 2017

Rugby Borough Council

Michael Beirne, Economic Investment Officer #

Nikki Grange, Arts, Heritage & Visitor Services Manager, Rugby Art Gallery, Museum & Visitor Centre #

Rob Back, Head of Growth and Investment #

Matthew Deaves, Communications Manager #

Simon Gardner, Visitor Centre Manager, Rugby Art Gallery, Museum and Visitor Centre

Liz Gascoigne, Visitor Centre Assistant and Data Management Steward, Rugby Art Gallery, Museum

Warwickshire County Council

Laura Taviner, Tourism Officer, Infrastructure & Regeneration, Economic Growth #

Alex Holmes, Project Manager, Infrastructure & Regeneration, Economic Growth) #

Rachel Baconnet, Regeneration Project Manager, Infrastructure & Regeneration, Economic Growth

Matthew Epps, Projects, Programmes and Funding Team Leader

Industry consultations

Thomas Crawford, Visitor Site Supervisor, Draycote Water, Severn Trent

Helen Peters, CEO, Shakespeare's England #

Vicky Martin, SE Waterway Manager, Canal and River Trust #

Aftab Gaffar, Managing Director, Rugby First #

Reverend Imogen Nay, St Andrew's Church Rugby, Director, Rugby First #

John Carvell, Director, Rugby First #

Peter Price, Leather worker, Webb Ellis Museum

June Picken, Director of Sales, Coombe Abbey

Mina Kashmir, Revenue Manager, Draycote Hotel, Dunchurch

Steve Chapman, Marina Manager, Wigrams Turn Marina & Ventnor Marina, Napton

Haley Hadley, Marketing & Sales Director, ABC Leisure Boat Hire

Sharon Hardy-McEvoy, General Manager, Ibis Hotel, Parklands M1, Crick

Ben Sanders, General Manager, Ansty Hall Hotel Macdonalds

Martin Peters, CEO, Leicester Shire Promotions

Kate Sugden, Head of Marketing, Warwickshire Wildlife Trust

Clare Cowland, Economic Development Officer, Daventry District Council

Helen Miller, Economic Development Manager, Northamptonshire County Council

Kate Dent, Head of Marketing & Communications, Northamptonshire Enterprise Partnership

Simon Bowers, Business Manager, Daventry District Council

Kerry Lord, Owner, Toft Studio/ Toft Alpacas

Andrew Keeling, ACK Tourism (consultant with North Warwickshire & Hinckley and Bosworth DM Plan)

Rachel Stephens, Community Development Officer, North Warwickshire DC

Claire England, Business Tourism, Visit Coventry and Warwickshire

Appendix A1 Tourism Workshop Attendees

Lisa Ash, Marketing Officer, Garden Organic

Rob Back, Head of Growth and Investment, Rugby Borough Council

Michael Beirne, Economic Investment Officer, Rugby Borough Council

Mark Butler, Manager, Olde Coach House, Ashby St Ledgers

John Carvell, Director, Rugby First

Paul Catterall, Director, Catteralls Coaches/ Travel Catteralls

Matthew Deaves, Communications Manager, Rugby Borough Council

Craig Earl, Country Parks Senior Ranger, Warwickshire County Council

Aftab Gaffar, Managing Director, Rugby First

Nikki Grange, Arts, Heritage & Visitor Services Manager, Rugby Art Gallery, Museum & Visitor Centre

Wesley Hartwell, Brand Director, CV22

Alex Holmes, Project Manager, Warwickshire County Council

Stuart Ikeringill, Rural Services Manager, Warwickshire County Council

Linsey Luke, Development Manager, Warwickshire& Coventry Federation of Small Businesses

Vicky Martin, SE Waterway Manager, Canal and River Trust

Stuart McNeil, Operations Manager, Dunchurch Park

Keith Miller, Dunchurch Photographic Society

Reverend Imogen Nay, Rector, St Andrew's Church, Rugby

Denise Osborne, Events Manager, Rugby School

Michael Parmee, Dunchurch Photographic Society

Chris Pearson, The Tantalus Project

Gisele Pellegrini, Director, Positive g

Helen Peters, CEO, Shakespeare's England

Rex Pogson, PCC Member, St Andrew's Church,

Laura Taviner, Tourism Officer, Warwickshire County Council

Oli Taylor, MD, CV22

Pete Thornley, The Tantalus Project

Paul Torr, Rugby and District Arts Society

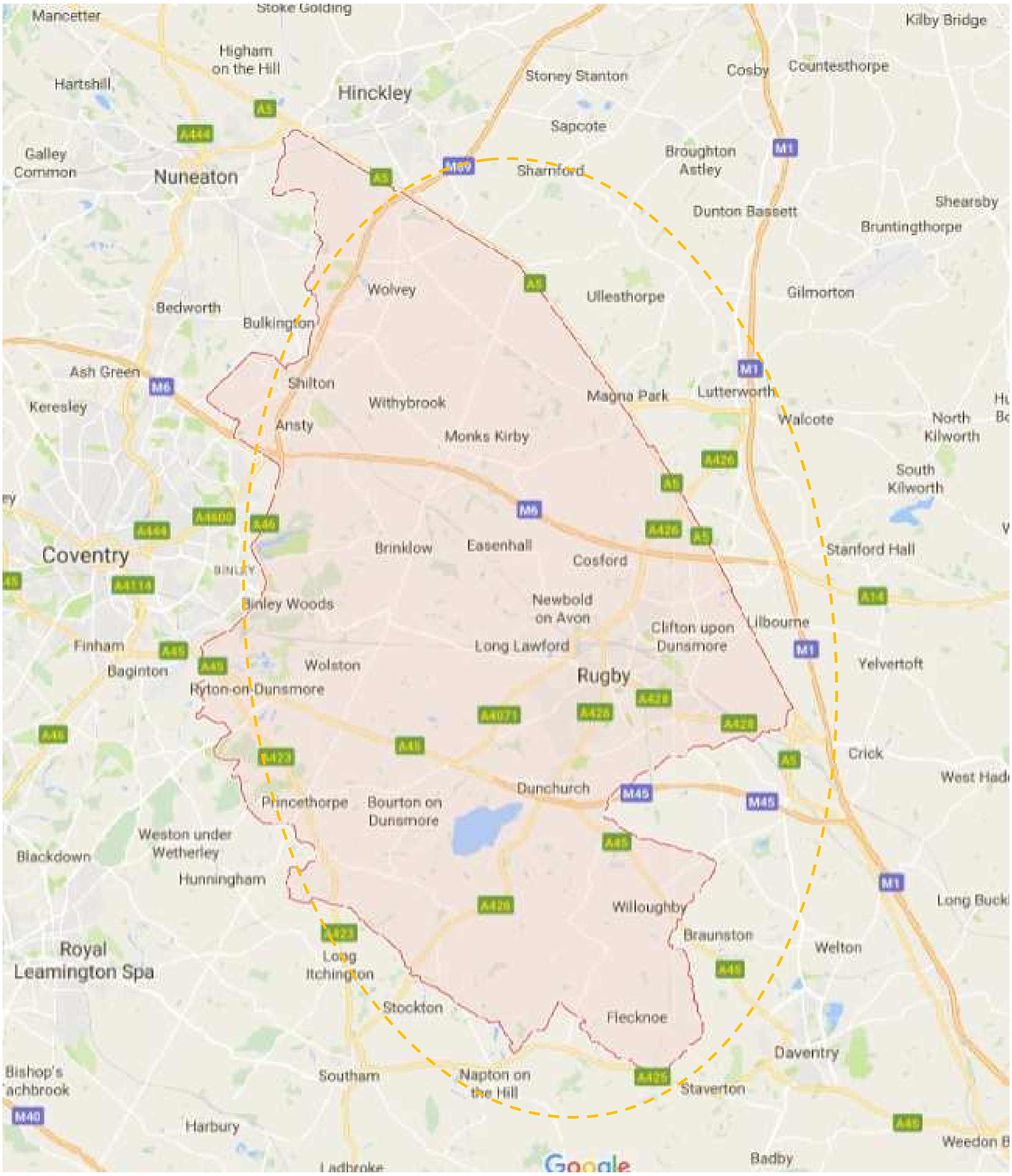
Martin Valentine, Rugby Artists Group

APPENDIX B Strategic Context

B1 The Rugby borough area and fuzzy boundaries

The area of the Plan covers the borough of Rugby and its 'fuzzy boundaries'. This borders onto and across the fringes of: Leicestershire , Northamptonshire, Shakespeare's England – Warwick/ Leamington / Stratford, Coventry, Nuneaton & Bedworth, North Warwickshire.

The map of the Rugby tourism area shows the Borough Council borders and also Rugby tourism's approximate sphere of influence in the dotted line oval. In many ways the rural areas of the district bordering Coventry, Nuneaton, Bedworth, Hinckley and Daventry are more strongly served by and connected to these urban neighbours than to Rugby /town centre.



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B2 Rugby Corporate Strategy 2017 – 2020

The newly launched Corporate Strategy for the borough 'Proud of our Past, Fit for the Future' takes an optimistic outlook, setting out the Borough Council's priorities for the next five years. A key issue is to facilitate physical and economic growth, while protecting the essential characteristics that make the borough special to local people.

Tourism, having been previously reduced in status as a factor for the Council, has become a notable attribute to the borough, and is now directly referenced as a growth opportunity. Structurally, the Council has created four new Portfolios, each with their own priorities. Within the **Growth and Investment Portfolio**, key Priorities relevant to developing the visitor destination are:

Promote sustainable growth and economic prosperity

- We will conserve and enhance the natural and built environment embracing Rugby's proud heritage and history

Promote and grow Rugby's visitor economy with our partners

- At a local level Rugby has a strong and growing visitor economy but the long term potential is huge. Rugby has a long and proud heritage that is not widely enough known. A key aim of this strategy is for The Rugby Town to become internationally recognised as the birthplace of the game and, from this catalyst, the town centre will become a regionally recognised cultural and visitor hub increasingly valued and visited by our local communities.

To do this we will:

- Open the World Rugby Hall of Fame visitor attraction, enhancing the reputation of The Rugby Town
- Celebrate our cultural and artistic heritage through Rugby Art Gallery and Museum, The BENN Hall and events and festivals
- Support Rugby town centre as a visitor destination for leisure, retail and cultural activities.

Other portfolios and priorities relate to greenspaces, community wellbeing and encouraging appropriate development – all of which have some connection with the visitor destination.

B3 Rugby Local Plan

The town has seen a number of recent retail developments, some in the town centre, and significantly the Elliot's Field Park on the edge of the town hosting major national brands. The green and clean environment is a source of pride to the local authority. Green spaces for recreation range from Caldecott Park in the town centre to Coombe Abbey Country Park in the west and Draycote Water in the south with an expanse of welcoming villages and countryside in between. Strategic development is to be focussed on the town of Rugby with development also foreseen in the 9 main rural settlements. However developments that are intrinsically relevant to the countryside may be allowed elsewhere.

There is much pride in the town being the birthplace and namesake of the game of rugby. This is recognised as a Unique Selling Point. No recent visitor strategy for the borough is in place however 3 of the 9 spatial objectives in the Borough Council's Draft Local Plan[1] relate to the visitor economy:

- Enhance the quality of outdoor and indoor sport, leisure, recreation and cultural facilities within the Borough and to ensure residents have access to good outdoor leisure and recreation facilities through the development of a developing green infrastructure network throughout the Borough
- To enhance the vitality of Rugby Town Centre, ensuring it has a complementary role to the out of town retail parks, providing a distinctive offer to both residents and visitors

[1] Ibid

- Build on Rugby's rural market town character by protecting, utilising and enhancing historic assets and ensuring all new development demonstrates high quality design, maintaining an attractive built environment throughout the Borough.

Policy ED4 of the Local Plan sets out acceptable tourism-related developments outside the urban area:

Tourism and Leisure

- Small-scale tourism, visitor accommodation and leisure based uses, including sport and recreation, particularly those which would help to provide local employment and support rural services
- Purpose-built visitor accommodation that is directly associated with and related to the scale and nature of an existing use
- A small-scale expansion of an existing holiday caravan/chalet site where this would secure benefits to its function and appearance
- Golf courses, golf driving ranges and ancillary facilities
- New or extended, relative to the scale and nature of an existing development, garden centres and nurseries; or
- Equine and equestrian related activities, wherever practicable using existing buildings and structures.

Farm Diversification

- Proposals that would support the ongoing viability of farms and other agricultural operations will be encouraged, subject to the following criteria being assessed and satisfied:
    - development on best quality agricultural land is avoided;
    - existing buildings and structures can be utilised as much as possible;
    - the scale and nature of the development is integrated into the existing landscape, with minimal adverse impact to its character;
    - the impact of the proposal on existing properties in the locality is minimal; and
    - the generation of vehicular movements is acceptable, and suitable consideration is given to of access and parking.

Chapter 7 of the Local Plan addresses Rugby town centre and recognises that: "… there is a need to develop policies that ensure the Town Centre can build on its offer in the following areas: independent shopping experience, leisure activities, cultural offerings and by making more of its historical assets to help shape the physical environment." It is noted that the town centre is vulnerable to competition from out of centre and internet retailing. Policy TC3 therefore will seek to permit development proposals for town centre uses (which include cultural and tourism uses) sequentially firstly to the town centre, before edge of centre or out of centre locations. Tourism, leisure and culture developments will be allowed in the wider town centre providing they do not harm the character, function, viability and vitality of the Primary Shopping Area.

B4 Rugby Town Centre Action Plan 2016 – 2020, Rugby Borough Council

Like many town centres across the country, Rugby town centre has faced a number of challenges in recent years. In order to thrive, the town centre needs to change and adapt to meet these challenges. Hence the Council working with partners and in consultation with businesses and residents, has drawn up the Rugby Town Centre Action Plan to support the delivery of a town centre fit for the future. Many of the attributes within the action plan reflect developing a healthy visitor destination – the vision is to build on the town centre's strengths – the strong independent retail sector, the wide range of food and drink outlets, and its cultural offer: Rugby School, Rugby Art Gallery and Museum, World Rugby Hall of Fame and the Rugby Football Museum.

There are five **main areas of focus** which form the basis of the action plan:

- Physical environment
- Town centre uses
- Marketing
- Investment
- The visitor economy.

The Vision is for *"A prosperous and attractive town centre which complements and connects to the retail parks on Leicester Road, offering a wide range of shops, leisure and entertainment opportunities for both residents and visitors, alongside public services and new homes for residents."*

The key Objectives virtually all have a relationship with attributes of the visitor destination, visitor economy, businesses and people working in the town. Many of the individually identified Actions (not shown here) have correlation with this emerging Destination Management Plan.

Objective: Deliver improvements to the physical environment of the town centre

The long-term vision to enhance the accessibility and quality of the public realm, which would require potential investment from not only the local authority, but key partners.

Objective: Encourage an increased number of residential dwellings in the town centre, creating an environment for food and drink, leisure, convenience shopping and independent retail

This proposal aims to support retail in the town centre and also promote a strong food, drink and leisure sector.

Objective: Develop an effective and cohesive approach to marketing the town centre with key stakeholders

A structured marketing plan will be developed with key stakeholders. This will ensure partners are working together to promote the town centre in a cohesive way, including the development of a new or existing brand. Marketing activities will cover a website, social media, email communications and printed publications.

Objective: Promote the town's visitor economy and build on Rugby's links to the game

Work will take place to improve Rugby as a visitor destination and attract people from local, regional, national and international markets, through a partnership approach

Includes task to **:** Establish a Destination Management Partnership (DMP) for Rugby

Objective: Develop a plan to attract investment and new businesses in the town centre

A business start-up service and grants schemes have helped new businesses to locate in the town centre. Encouraging businesses to contact the Valuation Office to ensure the rateable values for individual properties is correct.

B5 Rugby First Business Plan, The Next Five Years 2015 – 2020

Rugby First is an organisation that is focussed on ensuring Rugby town centre performs under the slogan "Clean, Safe and friendly". It operates a range of core services within the agreed Business Improvement District -BID mandate, voted for by the majority of town centre businesses in 2010, along with other services in partnership with the Borough Council. Steered by a voluntary board of local business people it ensures decisions made within the company are relevant to the business occupiers in the town centre.

The Rugby BID was the first in this region and one of the first in the country in 2005. In 2010, after five years of delivery local businesses showed their confidence and trust in the programme by voting "yes" again for a second term. This was again renewed in 2015 with a third five year mandate supported. The

Rugby BID is a direct response to local businesses' ideas to improve the trading environment, encourage footfall and enhance profitability. The core objectives have always been to make the town centre safer, cleaner and friendlier so that customers will come and businesses have the chance to prosper.

Businesses shape the BID, identifying projects or services that will add value to their business and agree how to manage it and how much they are prepared to pay. The funds collected are ring-fenced and used only to deliver a structured and guaranteed set of activities voted on by the businesses within the BID. The BID and the projects it will carry out DO NOT and CANNOT replace those services statutorily provided by the public agencies.

Four core project areas are delivered, ordered here to reflect those with more relevancy to the Destination Management Plan:

Marketing, Promotions & Events

This is about increasing footfall, spend and raising the profile of Rugby town centre. Rugby First in partnership with businesses, Rugby Borough Council and other organisations deliver a programme of high quality marketing, promotions and events which have proved extremely effective in increasing town centre footfall, spend, raising the profile of Rugby and local businesses, and attracting new customers and businesses to the town. The intention is to build on the legacy of the Rugby World Cup by establishing Rugby as a tourist venue and highlighting Rugby's unique selling points.

Town Rangers

The most recognisable, visible, high profile and friendly face of Rugby First is the Rangers in their red uniform. Patrolling the town centre their presence and services have made a real difference to businesses and customers - ensuring Rugby is safe, friendly and welcoming for all and a great place to do business.

CCTV

A state of the art CCTV system and award winning control room operating 365 days of the year, 24/7, has seen town centre crime levels fall significantly. The high definition cameras, including ANPR and loud speaker system, have proved invaluable in crime prevention and criminal arrests keeping the town centre safe for businesses and their customers.

Cleaning Service

A dedicated cleaning team at your service providing a range of specialist cleaning services – helping to ensure the town centre is a clean place to visit, a fresh place to do business and somewhere we can all be proud of.

B6 Warwickshire Visitor Economy Framework (VEF) 2013-18

Rugby is only, briefly, directly mentioned in Chapter 5 of the strategy as part of the "Gateways to the Countryside" rural and outdoor tourism product. This would contrast sharply with how Rugby is seen by those in Rugby which, in our view, is more as an attractive heritage town destination. The town and borough seem to be subsumed into "north Warwickshire" which is essentially anywhere not in Stratford and Warwick districts.

The VEF recognises that Warwickshire is a complex destination having the world renowned destinations of Stratford upon Avon and Warwick castle alongside towns and countryside tourism product which are weaker and far less mature, lacking in market appeal beyond largely local day trip or special interest markets[2]. Because of this the strategy sets out that "Warwickshire – as a whole - is not a coherent destination or 'brand' - it is a collection of different visitor products and experiences that visitors are accessing in lots of different ways. Delivery needs to recognise this – a 'one size fits all' approach will

[2] Warwickshire Visitor Economy Framework 2013-2018, TEAM for Warwickshire County Council

not be effective." In considering tourism partnerships the VEF notes, "In north Warwickshire [inc Rugby] collaborative tourism activity is minimal. Given the nature of the offer this is a pragmatic position".

However, business and conference tourism is identified as being important for nearby University of Warwick, Stoneleigh Park and a number of the county's hotels. The county also benefits from social programmes attached to business events being held in Birmingham and at the NEC. This is relevant to Rugby businesses.

A positive outlook for tourism is forecast with the authors of the Framework assessing that "all indicators point towards growth in the tourism economy". This can be achieved by:

- Boosting off-peak demand via UK short breaks, meeting & conferences and day visits. In North Warwickshire weekend breaks can be grown
- Stratford, Warwick & Leamington are attack brands for which overseas visitors are a target market
- Empty nesters and pre-families are segments for domestic breaks plus day visitors
- Conferences/business tourism is an opportunity to be developed with Coventry City Council, particularly with the possibility of social visits associated with the NEC.

There are **three Strategic Priorities** in achieving growth:

- Priority 1: **Creating Compelling Places to Visit**

  In today's highly competitive tourism market place future growth in Warwickshire's visitor economy will rely heavily on destinations, attractions and accommodation businesses that deliver memorable visit experiences.

- Priority 2: **Building Private Sector Marketing Capacity**

  With substantially reduced public sector tourism budgets the private sector will need to take the lead on marketing: public sector support and funding will still be needed however to facilitate private sector marketing collaboration and build the marketing skills of tourism business operators.

- Priority 3: **Extending the Benefits of Tourism**

  Boosting visitor demand both geographically and seasonally to ensure that the benefits of growing Warwickshire's visitor economy are felt more widely across the county and throughout the year.

These three priorities of the VEF were to be delivered through 6 action programmes, each of which has differing resonance with the Rugby area, product, markets, and needs:

- Programme 1: **Destination Development Programmes for Stratford-upon-Avon, Warwick & Royal Leamington Spa**
- Programme 2: **Gateways to the Countryside**

  Developing Warwickshire's rural tourism product and infrastructure for outdoor activities has a key role to play in extending the benefits of tourism beyond the county's 'attack' destinations and can make a significant contribution to improving the quality of life for Warwickshire residents. Various public, private and voluntary sector partners have objectives and ideas for projects to develop different aspects of the county's rural tourism and outdoor recreation product. The Gateways to the Countryside Programme is designed to support these partners in developing and taking forward such projects with assistance in terms of research, partnership co-ordination, funding bids and overarching marketing.

- Programme 3: **Destination Marketing**

  With changes to destination marketing and consumer behaviour and constrained marketing budgets in Warwickshire, the initial priority for destination marketing is to focus on cost effective, value added promotional activities. Fragmentation of activity is an issue (for consumers, industry and Local Authorities). The Destination Marketing programme is about providing a single co-ordinated marketing programme under the leadership of the Shakespeare's England DMO. This would include a tourism website that has a 'fulfilment' role – i.e. providing one source of comprehensive information. This should be supported by a programme of search engine optimisation and social media, strong PR activity, and proactive partnerships with organisations like VisitBritain, and VisitEngland.

There should also be a 'porous' geographic focus. While the geographic focus should be on the core south Warwickshire offer the site should also cover a wider area including north Warwickshire and the Cotswolds to reflect potential visitor interests.

- Programme 4: **Tactical Marketing**

  The Tactical Marketing Programme is about developing private sector led tactical marketing campaigns to drive business to certain types of tourism businesses and/or boost off-peak demand. These will complement and add value to the destination marketing programme. Potential campaigns that the Programme will initially seek to support include overseas marketing, a potential Warwickshire & Coventry Visitor Attractions campaign, and a potential Coventry (& Warwickshire) Conference Venues campaign.

- Programme 5**: Digital Marketing Skills**
- Programme 6: **Advocacy & Intelligence**

B7 Warwickshire County Council Tourism Policy, November 2012

The County Council's tourism policy sets out its role in delivery of the Visitor Economy Framework and how the visitor economy contributes to the Council's ambitions for economic growth and work/life balance.

There are nine principles to the policy covering the role of Stratford upon Avon, Warwick and Royal Leamington Spa as attack brands to be marketed by an external body (Shakespeare's England) with development support from WCC officers. "Destination development plans (..) need to be market-led and commercially driven". Rugby is not mentioned and must be assumed to be part of the Gateways to the Countryside product.

WCC's key role is in advocacy for the visitor economy and supporting its development, for instance through commissioning research. Interestingly WCC Tourism Policy 9 states: "Where the County Council needs to market its heritage and cultural services, country parks and rights of way and/or the county's rural tourism and recreation product to visitor markets, it will look first to delivery through the Shakespeare's England DMO before considering other delivery options." It is not clear how WCC's tourism assets are currently marketed.

B8 "The Knowledge Capital of the UK" Updated Strategic Economic Plan, August 2016 Coventry & Warwickshire LEP

Culture and tourism was not featured in the 2015 Strategic Economic Plan, however this updated 2016 plan sees the sector recognised as a driver of growth being now one of the 5 pillars of activity. Advanced manufacturing and engineering are the mainstay of the sub-regional economy.

There is very little reference to Rugby borough – it's neither the best nor worst performing borough on most metrics. Across the area there is a lack of growth in SMEs with a need for investment in skills and better connecting businesses to gain agglomeration benefits. However, the Culture & Tourism section notes that Rugby has tourism potential which is not being filled.

Opportunities are seen to be the good road & rail infrastructure but although investments are planned in the A45, A46 and A5 corridors bringing forward sites for development these do not seem to be in the

Rugby area. Rugby sits outside the priority employment and innovation sites corridor which is from Hinckley/Nuneaton to Warwick via Coventry. Overall, there is a sense that the Coventry and Warwickshire sub-region is underperforming despite it being well placed on the strategic transport network and with great links to London, as well as a strong culture and tourism offer. Skills such as customer service, leadership and management and job-specific skills need to be improved.

Specifically for the visitor economy growth the focus is on this being delivered through Coventry's Capital of Culture 2021 bid and the Shakespeare's England offer. However, there will also be focus on ensuring that the benefits of an enhanced visitor economy are felt throughout Coventry & Warwickshire. Actions are to be delivered by:

"Maintaining and growing our cultural and tourism assets is a key priority for CWLEP. To achieve this ambition, there is a need to build on existing strengths within the sub-region, coupled with a need to better package and promote key visitor attractions across the full CWLEP area. This would facilitate increases in overnight stays and therefore increases in visitor spend levels. Investment will focus on economic and cultural development, including:

- Innovative contemporary approaches in historic environments and joined-up public spaces
- Deliver an improved and integrated transport infrastructure to improve connectivity
- Training, skills development and cultural education
- Investment in digital infrastructure
- Enhancing the supply of accommodation to enable longer stays and increased visitor spending."

"To enable the growth of the sector and maximise the impacts of visitor spend, it is crucial that the area's visitor attractions, major events, and accommodation are marketed and promoted sufficiently."

The "Growing our talent" strand of activity focuses on enhancing skills levels of local residents as a means of raising local productivity levels, and notes that this is relevant to key sectors such as Culture & Tourism"

Funding strands of tourism product development are available through the CWLEP ESIF strategy.

B9 Midlands Engine Strategy, March 2017, Department for Communities and Local Government

The Government has recently published the Midlands Engine Strategy and Rugby sits at the heart of this region. £392 million will be invested across the Midlands through the Local Growth Fund. Of this £20 million is allocated to a Midlands Skills Challenge to help close the skills gap between the Midlands and the rest of the country. A £250 million Midlands Engine Investment Fund will shortly be launched to finance the expansion plans of SMEs across the region. The Midlands Trade and Investment Programme will help position the Midlands Engine on the global stage.

The visitor economy is loosely referred to in the chapter on Enhancing Quality of Life. An announcement of "£2 million to improve cultural infrastructure in Warwick, including through redeveloping and expanding the Warwick Arts Centre" was made. Aside from a handful of other tourism-related investments elsewhere this part of the strategy concentrates on cultural capital as a way of attracting skilled workers to the region.

The strategy acknowledges the lack of connectivity between parts of the Midlands and low skills base which is holding back growth.

B10 Destination Management Plan for Shakespeare's England Region 2015–2025, March 2015

Shakespeare's England is the Destination Management Organisation for Stratford and Warwick districts which sit on Rugby's western border. The DMO has been established with the support of both district councils and has a significant private sector membership financing its operation.

The destination management plan provides the focus for the towns of Stratford, Warwick, Leamington Spa, which are recognised as Visit England attack brands, and their rural hinterlands. It also includes important businesses outside that area such as Birmingham airport, Bicester Village and links to the Cotswolds.

The document does make reference to potential working with Rugby BID, and notes that Leamington Spa is relevant to a younger market of 18-30 year olds, a segment which needs to be developed elsewhere.

"The overall visitor experience should be developed across the region" is a cautionary note as is the observation that people can't locate Shakespeare's England on a map.

Building on many years of predecessor DMO bodies, the focus for the Shakespeare's England DM Plan is around:

PRIORITY ONE: Evidence base and intelligence – understanding of the destination, current position and opportunities.

PRIORITY TWO: Destination (infrastructure) development – focus for key infrastructure development opportunities, the strategic direction and connectivity.

PRIORITY THREE: Market development – establish what markets provide the best opportunities to increase volume and value of visitors.

PRIORITY FOUR: Communication and profile – communication of location and wider offer, pinpointing position in the UK and profile as a destination of international importance.

PRIORITY FIVE: Product development – actions needed to develop new products and offers to attract new markets and extend the dwell time/return propensity of existing visitors.

PRIORITY SIX: Welcome, information, experience – improve the welcome provided to visitors, the information they receive and the overall experience they have.

PRIORITY SEVEN: Skills, business development, education and careers – developing businesses, careers and people working in, and wishing to enter, the industry.

B11 Coventry 2014 – 2024 An Emerging Vision for Tourism

This is an ambitious plan for the city which includes the aspiration to attract major conferences of 4000+ delegates. Research (2012 figures) has shown that 38% overnight visits are for business, VFR 35%, and Holiday trips 23%. Coventry ranks 13th in destinations for business tourism, but is not in the top 20 for trips when all purposes are considered. Business tourism is therefore the lead target segment.

Coventry's marketing is branded as Visit Coventry & Warwickshire and this plan advocates the desire to "be seen as an equal 'partner' to Warwickshire's established rural offer, with a fully-fledged city DMO". The desire to **Change Perceptions of the city is the number one Objective** and the bid to be UK City of Culture in 2021 is a key step in this direction.

Subsidiary actions are to **strengthen the Heritage and Culture offers**, become known as a sporting city and to engage with students and graduates at the local universities.

B12 Nuneaton and Bedworth Destination Assessment, May 2016, The Tourism Company

Nuneaton and Bedworth Borough council has recognised the value of tourism to the wider economy as a "safe bet in uncertain times"[3] bringing employment opportunities and enhancing residents' quality of life. The Destination Assessment highlights the opportunities around the bicentenary of the birth of

[3] Nuneaton and Bedworth Borough Council, At the centre of the Automotive Industry - Economic Development Strategy, October 2016

George Eliot in 2019. Festivals and events are seen as the way to drive visitor numbers with the business tourism and VFR markets currently being strongest.

The report recognises that the Borough's tourism offer can be strengthened by co-ordinating with neighbouring authorities and this is a possible opportunity for Rugby where literary tourism and canals might be possible joint themes. "Establish formal tourism links with adjoining local authorities. Nuneaton and Bedworth has much in common with North Warwickshire, Rugby, Hinckley & Bosworth, Coventry and Shakespeare's Country. There will be areas of mutual interest in terms of infrastructure development and wider promotion. NBBC, through NWTA, should explore potential links and areas of mutual interest/support."

B13 North Warwickshire and Hinckley & Bosworth Destination Management Plan, 2017 Draft

Started two months before Rugby's DM Plan, the ACK Tourism consultancy developed a DM Plan (draft status) for the two collaborating local authorities of North Warwickshire and & Hinckley & Bosworth. This will work across Warwickshire/Leicestershire boundaries, backed by LEADER rural funding. The plan is evolving, with a focus on reducing duplication between small stretched local authorities and tourism associations, to increase co-ordination of effort. The outcomes should improve the tourism product and inform investment decisions and interventions, in order to encourage tourism business expansion and new businesses.

Product development priorities and key growth market opportunties are identified. The Plan anticipates working on clusters of attractions/localised destinations, with improved marketing and a tourism coordinator role.

The North Warwickshire and Hinckley & Bosworth Destination Management Plan 2017-2022 comprises 9 inter-related programmes of projects designed to address the identified priorities for achieving tourism growth in the two boroughs, and to support and accelerate projects that have already been worked up, or that are being actively talked about:

- Programme 1: Attraction Development
- Programme 2: Accommodation Development
- Programme 3: Heritage and Culture
- Programme 4: Events & Festivals
- Programme 5: Capitalising on the Canals
- Programme 6: Walking & Cycling
- Programme 7: Bosworth Tourism Partnership
- Programme 8: Strengthening Northern Warwickshire Tourism
- Programme 9: Tourism Marketing Workshops

B14 Northamptonshire

Currently Northamptonshire does not have a Destination Management Plan/ visitor economy strategy. Recently tourism promotion had been carried out alongside an inward investment role by the Northamptonshire Economic Partnership but this was disbanded in 2016. Daventry District Council has recently held its first Tourism Forum meeting for local businesses and its plans to build the Daventry Canal Arm and boat lift are a strong part of its regeneration plans.

A small private sector consortium is taking forward marketing activity, mainly geared around historic houses.

B15 Leicestershire

Leicester Shire Promotions is the tourism organisation for Leicester and Leicestershire. The company works in partnership with Leicester City Council, Leicestershire County Council, Leicester and Leicestershire Enterprise Partnership, VisitEngland and the local tourism industry to deliver campaigns and services to attract more visitors to the city and county.

Due to changing funding arrangements by the County and City Councils, the tourism support will be changing over the next two financial years.

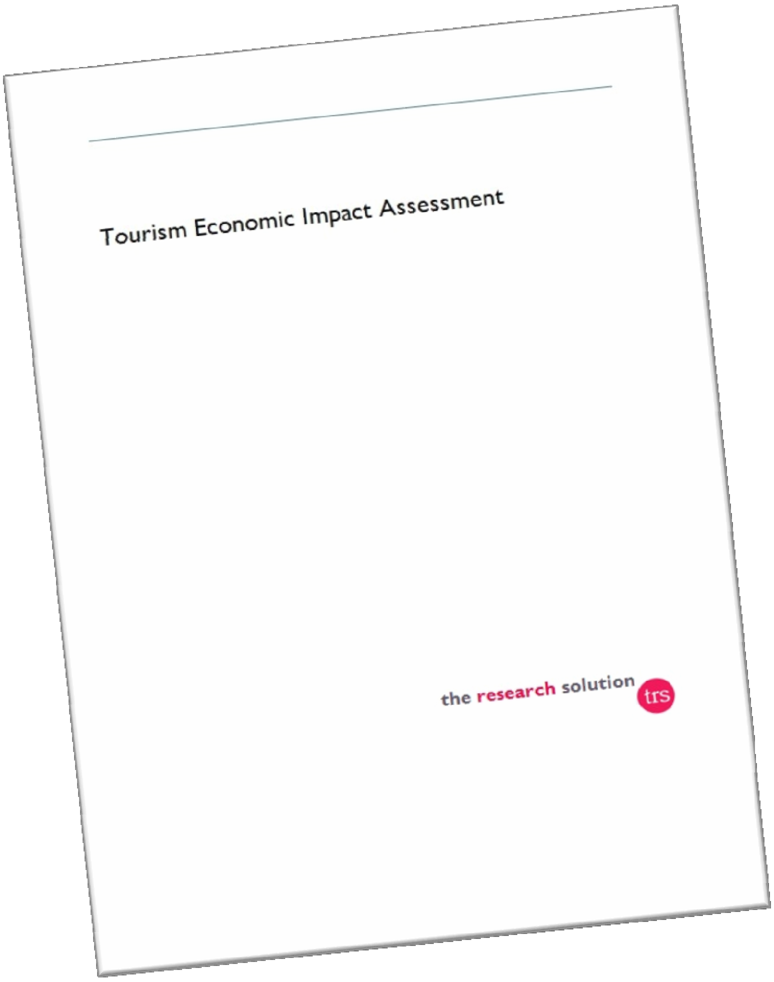
The Leicester and Leicestershire Enterprise Partnership (LLEP) Tourism and Hospitality Sector Growth Plan 2015, which provides the overview of county tourism priorities. The Key Actions in the Growth Plan include:

- Investment programme to support key attractions to increase their capacity
- Secure more events and conferences
- Support rural businesses to diversify their offer into tourism and hospitality
- Work with Superfast Leicestershire to enable tourism businesses to gear up for superfast broadband
- The LLEP and partners will continue to support a regional tourism service and support hotel development.

There are actions above that will compete for visitors to Rugby, such as strengthening key visitor attractions (Twycross Zoo, Richard III). However, it could also be viewed that these will be drawing more people into the broader area – enabling the 'fuzzy borders' to benefit from this influx of new visitors to the area.

APPENDIX C Tourism Economic Impact Assessment

the research solution


Tourism Economic Impact Assessment

the research solution trs

Economic Impact of Tourism
Rugby Borough- 2015

trs

Produced by:

the research solution

trs

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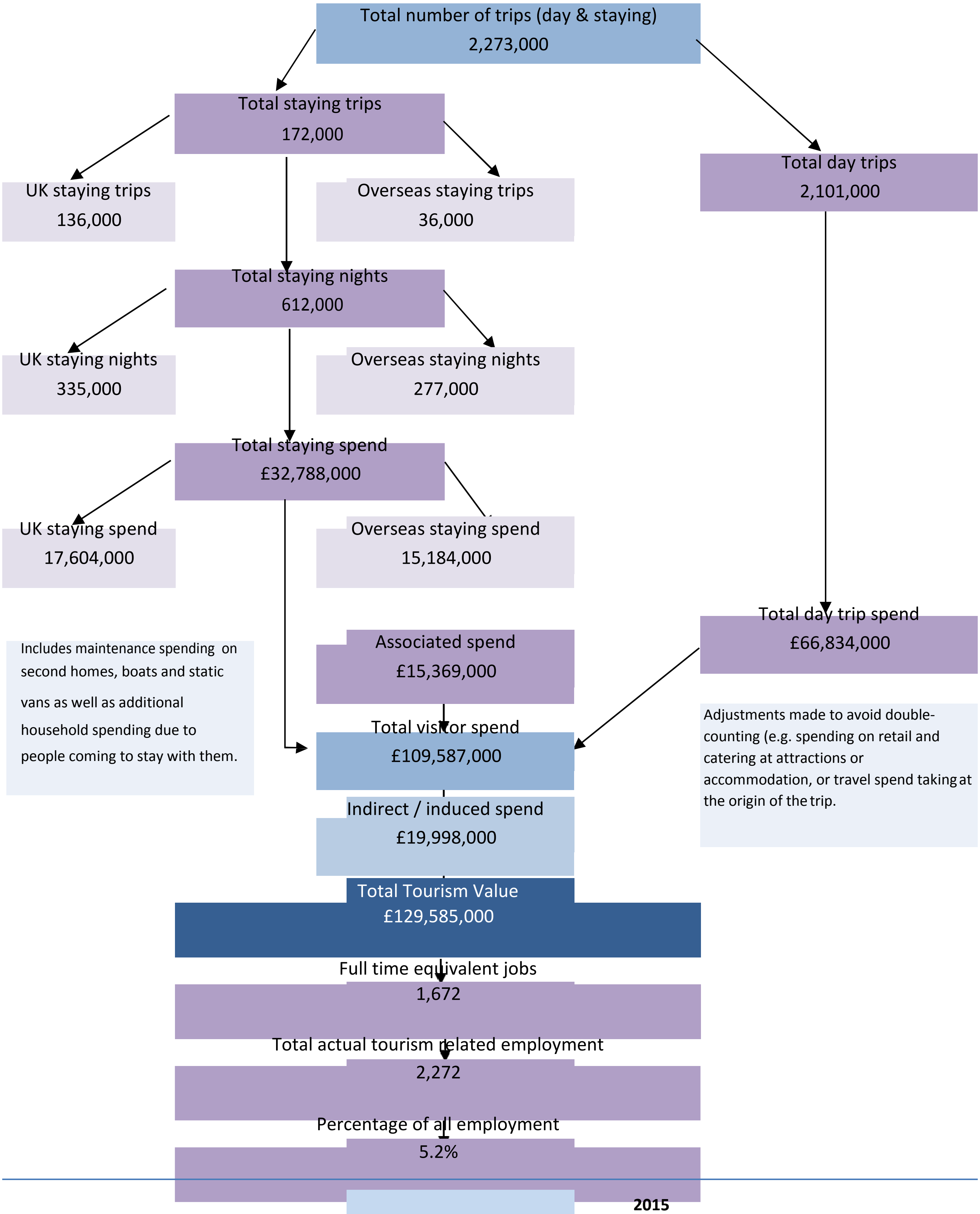
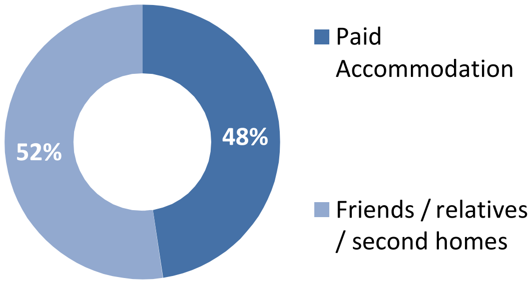
Economic Impact of Tourism – Headline Figures Rugby

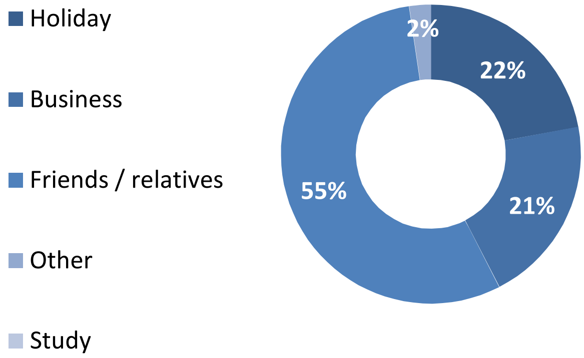


		2015
Average length stay (nights x trip)		3.56
Spend x overnight trip	£	190.63
Spend x night	£	53.58
Spend x day trip	£	31.81

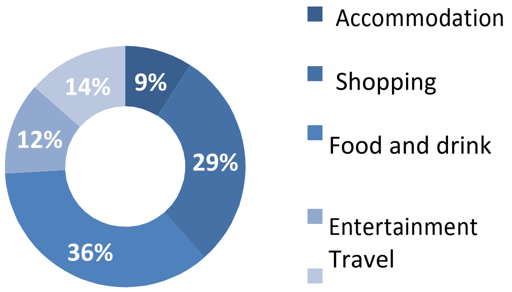
Type of Accommodation



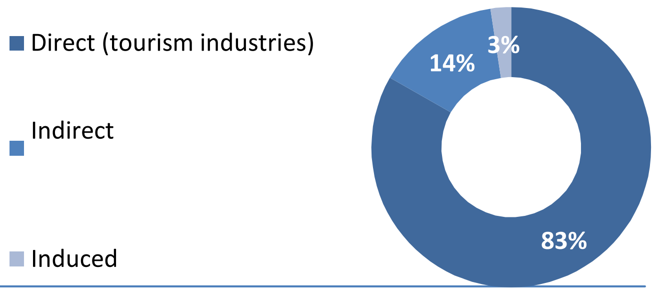
Trips by Purpose



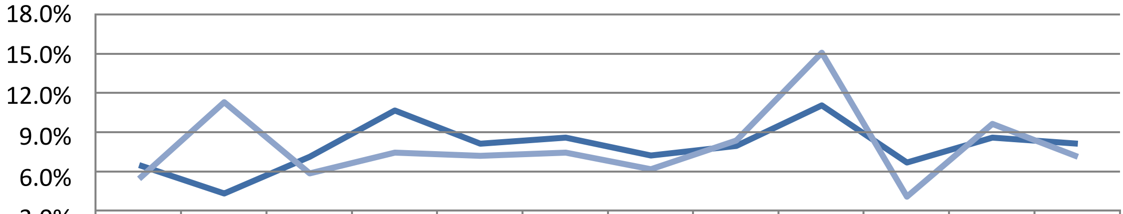
Breakdown of expenditure



Type of employment

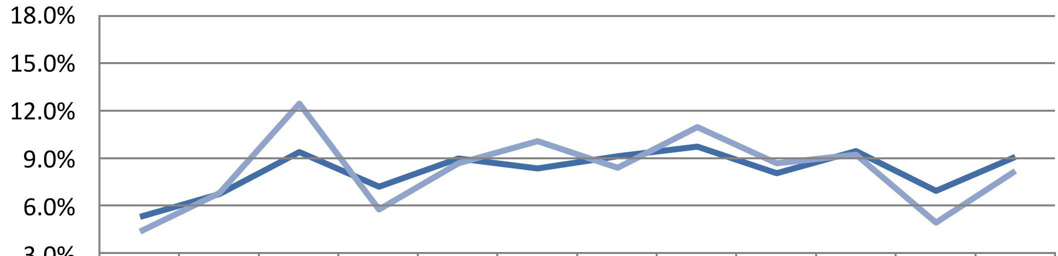


Seasonality - Day visitors



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Day trips	7.0%	4.9%	7.6%	11.0%	8.5%	9.0%	7.7%	8.4%	11.3%	7.1%	9.0%	8.5%
Day spend	5.9%	11.6%	6.4%	7.9%	7.7%	7.9%	6.7%	8.8%	15.2%	4.6%	10.0%	7.6%

Seasonality - Overnight visitors



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Overnight trips	5.5%	6.9%	9.5%	7.3%	9.1%	8.5%	9.2%	9.8%	8.2%	9.6%	7.1%	9.2%
Overnight spend	4.5%	6.9%	12.5%	5.9%	8.8%	10.2%	8.5%	11.1%	8.8%	9.3%	5.1%	8.3%

Contents **Page**

Contextual analysis

Domestic tourism

In 2015, British residents took 102.7 million overnight trips in England, totalling 300 million nights away from home, with an expenditure of £19.6 billion. The number of domestic trips was 11% higher than in 2014, and the amount spent increased by 8%, reaching an all-time high in nominal terms. The West Midlands region experienced a 10% year-on-year increase in overnight trips during 2015. Bednights were down 4% on 2014 and expenditure was down by 4%.

Visits from overseas

The number of visits in 2015 grew 5% to a record 36.1 million, after several years of growth since 2010. Average spend per visit was £611 in 2015, down from the peak of £650 per visit in 2013 and reflecting the relative strength of sterling in 2015. The number of visitor nights spent in the UK increased by 3% in 2015 to 273 million, with the average number of nights per visit standing at 7.6.

London is a key destination for inbound visitors to the UK. In 2015 18.6 million visitors spent time in the capital, spending just short of £11.8bn. This represents 54% of all inbound visitor spending, with 40% of visitor nights spent in the capital. The rest of England attracted 15.2 million inbound visitors who spent an estimated £7.5bn, representing 34% of all inbound visitor spend.

Overseas trips to the West Midlands region were 8% up on 2014 to reach just 2.11 million overnight trips. The total number of nights was down by 12% to reach 13.7 million in 2014. Spend was also up 7% to £815 million in 2015.

- Holiday visits are particularly likely to include going to a theatre with Stratford-upon-Avon a major draw
- The West Midlands is also one of the most popular areas for watching sport, the number of visitors coming primarily for this reason is behind only London and the North West
- Going to the pub and socialising with locals are popular, whilst eating out is less likely here than in many areas - probably a reflection of the high proportion of visits which involve staying as a guest with friends or relatives
- Those from the Irish Republic and France dominate overseas visits to the area, accounting for two in five holidaymakers (compared to around one in five nationally). Short travel times and event based visits may contribute to relatively few visits lasting over a week
- The West Midlands attracts holiday visits all year round, possibly boosted by non-seasonal activities such as shopping or going to the theatre. The area sees relatively high numbers of visits from those travelling with children but also from older visitors.

The International Passenger Survey (IPS) is conducted by Office for National Statistics and is based on face- to-face interviews with a sample of passengers travelling via the principal airports, sea routes and the Channel Tunnel, together with visitors crossing the land border into Northern Ireland. The number of interviews conducted in England in 2015 was 40,830. This large sample size allows reliable estimates to be produced for various groups of passengers despite the low proportion of travellers interviewed. The IPS provides headline figures, based on the county or unitary authority, for the volume and value of overseas trips to the UK. The sample for West Midlands was 2,054 interviews.

Day visitors

The 1,525 million Tourism Day Visits that were taken by GB residents during 2015 is lower than compared to those taken in 2014 (1,585 million Tourism Day Visits), falling by -4%. Total expenditure during these visits remained unchanged year-on-year, however, at £53.9 billion in 2015 and £53.8 billion in 2014.

The largest proportion of visits were taken to destinations in England (1,298 million visits or 85% of the total) while 8% of visits (124 million) were taken to Scottish destinations and 5% to places in Wales (75 million). The distribution of expenditure during visits broadly reflects this pattern.

The West Midlands region experienced a 3% decrease in the volume of trips between 2014 (119 million trips) and 2015 (115 million trips). The overall value reached £4.7 billion in 2015.

How accurate is the Regional data?

The regional data has to be interpreted with lots of caution, as the IPS has never been designed to be able to produce highly accurate results at regional level. Whilst the survey gives good precision at the national level, regional breakdowns of the data will almost inevitably lead to less reliable results. For example although the sample size for Merseyside was 322 in 2004 the margin of error for visits to this area is 40.9%. We have to bear in mind that although the IPS matches accurately the overall volume of overseas visitors coming to the UK, the IPS does not give a precise picture of where these overseas visitors stayed during their stay in the UK. This is because some interviews are not done in a few regional airports. For example until 2005 no interviews were carried at Prestwick and Liverpool airports, which may have resulted into less accurate estimates for Scotland and Northern England.

The International Passenger Survey (IPS) data is a key driver for the Cambridge model and as outlined above, needs to be used with caution when looking at regional level data. We have applied a 3 year rolling average to this data to help smooth out short term market fluctuations and highlight longer-term trends.

Volume of Tourism

Staying Visitors - Accommodation Type

Trips by Accommodation

	UK		Overseas		Total	
Serviced	44,000	32%	8,000	22%	52,000	30%
Self catering	3,000	2%	800	2%	3,800	2%
Camping	7,000	5%	1,000	3%	8,000	5%
Static caravans	1,000	1%	0	0%	1,000	1%
Group/campus	5,000	4%	4,000	11%	9,000	5%
Paying guest	0	0%	0	0%	0	0%
Second homes	1,000	1%	500	1%	1,500	1%
Boat moorings	0	0%	0	0%	0	0%
Other	5,000	4%	3,000	8%	8,000	5%
Friends & relatives	71,000	52%	19,000	53%	90,000	52%
Total 2015	**136,000**		**36,000**		**172,000**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	79,000	24%	26,000	9%	105,000	17%
Self catering	7,000	2%	11,000	4%	18,000	3%
Camping	21,000	6%	8,000	3%	29,000	5%
Static caravans	1,000	0%	0	0%	1,000	0%
Group/campus	17,000	5%	71,000	26%	88,000	14%
Paying guest	0	0%	0	0%	0	0%
Second homes	7,000	2%	5,000	2%	12,000	2%
Boat moorings	0	0%	0	0%	0	0%
Other	19,000	6%	8,000	3%	27,000	4%
Friends & relatives	184,000	55%	148,000	53%	332,000	54%
Total 2015	**335,000**		**277,000**		**612,000**	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£10,098,000	57%	£3,043,000	20%	£13,141,000	40%
Self catering	£393,000	2%	£643,000	4%	£1,036,000	3%
Camping	£776,000	4%	£307,000	2%	£1,083,000	3%
Static caravans	£60,000	0%	£0	0%	£60,000	0%
Group/campus	£514,000	3%	£4,318,000	28%	£4,832,000	15%
Paying guest	£0	0%	£0	0%	£0	0%
Second homes	£235,000	1%	£350,000	2%	£585,000	2%
Boat moorings	£0	0%	£0	0%	£0	0%
Other	£550,000	3%	£273,000	2%	£823,000	3%
Friends & relatives	£4,978,000	28%	£6,251,000	41%	£11,229,000	34%
Total 2015	**£17,604,000**		**£15,184,000**		**£32,788,000**	

Serviced accommodation includes hotels, guesthouses, inns, B&B and serviced farmhouse accommodation. Paying guest refers to overseas visitors staying in private houses, primarily language school students. Other trips includes nights spent in transit, in lorry cabs and other temporary accommodation.

Staying Visitors - Purpose of Trip

Trips by Purpose

	UK		Overseas		Total	
Holiday	25,000	18%	13,000	36%	38,000	22%
Business	32,000	24%	3,000	8%	35,000	20%
Friends & relatives	77,000	57%	18,000	50%	95,000	55%
Other	2,000	1%	2,000	6%	4,000	2%
Study	0	0%	0	0%	0	0%
Total 2015	**136,000**		**36,000**		**172,000**	

Nights by Purpose

	UK		Overseas		Total	
Holiday	63,000	19%	57,000	21%	120,000	20%
Business	82,000	24%	13,000	5%	95,000	16%
Friends & relatives	183,000	55%	181,000	65%	364,000	59%
Other	8,000	2%	25,000	9%	33,000	5%
Study	0	0%	0	0%	0	0%
Total 2015	**335,000**		**277,000**		**612,000**	

Spend by Purpose

	UK		Overseas		Total	
Holiday	£4,419,000	25%	£4,724,000	31%	£9,143,000	28%
Business	£6,517,000	37%	£1,483,000	10%	£8,000,000	24%
Friends & relatives	£5,810,000	33%	£7,995,000	53%	£13,805,000	42%
Other	£858,000	5%	£983,000	6%	£1,841,000	6%
Study	£0	0%	£0	0%	£0	0%
Total 2015	**£17,604,000**		**£15,184,000**		**£32,788,000**	

Day Visitors

Trips and Spend by Urban, Rural and Coastal Area

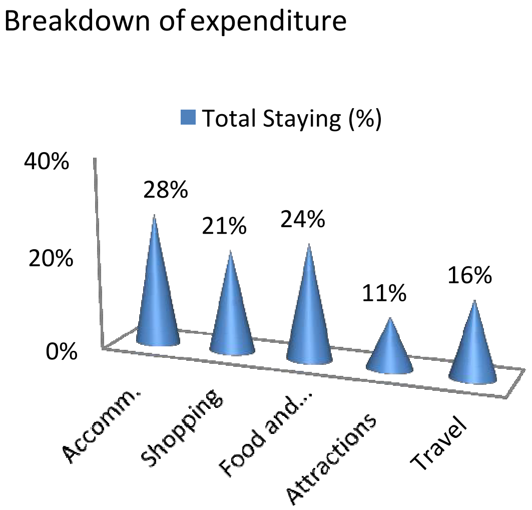
	Trips	Spend
Urban visits	995,000	38,533,000
Countryside visits	1,106,000	28,301,000
Total 2015	**2,101,000**	**66,834,000**

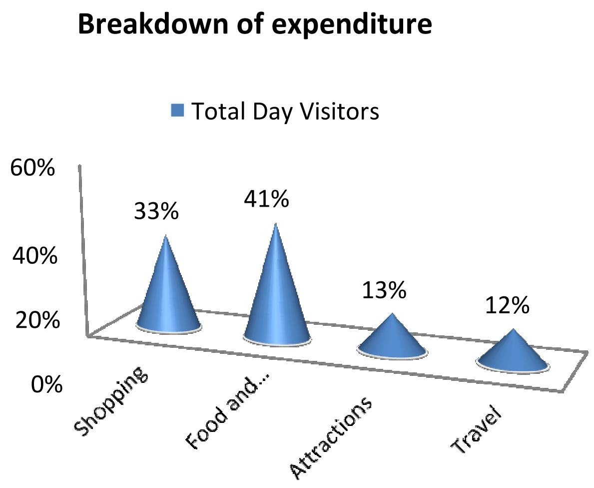
Value of Tourism

Expenditure Associated with Trips:

Direct Expenditure Associated with Trips

		Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists		£5,184,000	£2,507,000	£4,381,000	£1,850,000	£3,683,000	£17,605,000
Overseas tourists		£3,875,000	£4,505,000	£3,562,000	£1,660,000	£1,583,000	£15,185,000
Total Staying		£9,059,000	£7,012,000	£7,943,000	£3,510,000	£5,266,000	£32,790,000
Total Staying (%)		28%	21%	24%	11%	16%	100%
Total Day Visitors		£0	£22,327,000	£27,461,000	£8,802,000	£8,245,000	£66,835,000
Total Day Visitors		0%	33%	41%	13%	12%	100%
Total	**2015**	**£9,059,000**	**£29,339,000**	**£35,404,000**	**£12,312,000**	**£13,511,000**	**£99,625,000**
%		**9%**	**29%**	**36%**	**12%**	**14%**	**100%**





Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£143,000	£0	£0	£15,226,000	£15,369,000

Spend on second homes is assumed to be an average of £2,000 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,000 on berthing charges, servicing and maintenance and upgrading of equipment. Static van spend arises in the case of vans purchased by the owner and used as a second home. Expenditure is incurred in site fees, utility charges and other spending and is estimated at £2,000. Additional spending is incurred by friends and relatives as a result of people coming to stay with them. A cost of £175 per visit has been assumed based on national research for social

Direct Turnover Derived From Trip Expenditure

Business turnover arises as a result of tourist spending, from the purchase of supplies and services locally by businesses in receipt of visitor spending and as a result of the spending of wages in businesses by employees

	Staying Visitor	Day Visitors	Total
Accommodation	£9,217,000	£549,000	£9,766,000
Retail	£6,942,000	£22,103,000	£29,045,000
Catering	£7,705,000	£26,637,000	£34,342,000
Attractions	£3,659,000	£9,300,000	£12,959,000
Transport	£3,159,000	£4,947,000	£8,106,000
Non-trip spend	£15,369,000	£0	£15,369,000
Total Direct 2015	**£46,051,000**	**£63,536,000**	**£109,587,000**

Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

Supplier and Income Induced Turnover

	Staying Visitor	Day Visitors	Total
Indirect spend	£5,464,000	£8,581,000	£14,045,000
Non trip spending	£3,074,000	£0	£3,074,000
Income induced	£2,323,000	£556,000	£2,879,000
Total 2015	**£10,861,000**	**£9,137,000**	**£19,998,000**

Income induced spending arises from expenditure by employees whose jobs are supported by tourism

Total Local Business Turnover Supported by Tourism Activity – Value of Tourism

	Staying Visitor	Day Visitors	Total
Direct	£46,051,000	£63,536,000	£109,587,000
Indirect	£10,861,000	£9,137,000	£19,998,000
Total Value 2015	**£56,912,000**	**£72,673,000**	**£129,585,000**

Employment

The model generates estimates of full time equivalent jobs based on visitor spending. The total number of 'actual' jobs will be higher when part time and seasonal working is taken into account. Conversion of full time equivalent jobs into actual jobs relies on information from business surveys in the sectors receiving

Employment

Direct employment

	Full time equivalent (FTE)					
	Staying Visitor		**Day Visitor**		**Total**	
Accommodation	147	23%	9	1%	156	12%
Retailing	43	7%	136	19%	179	13%
Catering	119	19%	410	58%	529	39%
Entertainment	48	8%	121	17%	169	13%
Transport	19	3%	30	4%	49	4%
Non-trip spend	256	41%	0	0%	256	19%
Total FTE 2015	**632**		**706**		**1,338**	

	Estimated actual jobs					
	Staying Visitor		**Day Visitor**		**Total**	
Accommodation	218	26%	13	1%	231	12%
Retailing	64	8%	204	20%	268	14%
Catering	178	21%	615	59%	793	42%
Entertainment	67	8%	171	16%	238	13%
Transport	27	3%	42	4%	70	4%
Non-trip spend	292	34%	0	0%	292	15%
Total Actual 2015	**847**		**1,046**		**1,892**	

Indirect & Induced Employment

	Full time equivalent (FTE)		
	Staying Visitor	**Day Visitors**	**Total**
Indirect jobs	142	143	285
Induced jobs	39	9	48
Total FTE 2015	**181**	**152**	**333**

	Estimated actual jobs		
	Staying Visitor	**Day Visitors**	**Total**
Indirect jobs	162	163	325
Induced jobs	44	11	55
Total Actual 2015	**206**	**174**	**380**

Total Jobs

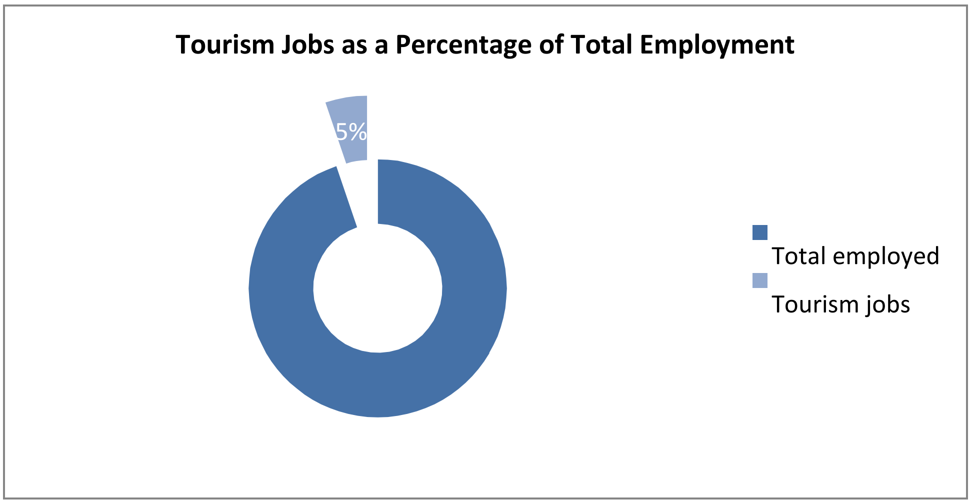
Actual jobs are estimated from surveys of relevant businesses at locations in England and take account of part time and seasonal working.

		Full time equivalent (FTE)				
	Staying Visitor		Day Visitor		Total	
Direct	632	78%	706	82%	1,338	80%
Indirect	142	18%	143	17%	285	17%
Induced	39	5%	9	1%	48	3%
Total FTE 2015	**813**		**859**		**1,672**	

		Estimated actual jobs				
	Staying Visitor		Day Visitor		Total	
Direct	847	80%	1,046	86%	1,892	83%
Indirect	162	15%	163	13%	325	14%
Induced	44	4%	11	1%	55	2%
Total Actual 2015	**1,053**		**1,219**		**2,272**	

Tourism Jobs as a Percentage of Total Employment

	Staying Visitor	Day visitors	Total
Total employed	43,500	43,500	43,500
Tourism jobs	1,053	1,219	2,272
Proportion all jobs	**2%**	**3%**	**5%**



Economic Impact of Tourism – Headline Figures Rugby - 2015

The key volume and value results included in this report are derived from the various sources as described throughout the report. These include regional and county breakdowns from national level data (Great Britain Tourism Survey and International Passenger Survey) as well as jobs and income information such as the Annual Survey of Hours & Earnings.

At a local level, the occupancy survey provides accurate local occupancy levels and known accommodation stock.

The key 2015 results of the Economic Impact Assessment are:

2.3 **million trips** were undertaken in the area
2.1 **million** day trips
0.2 **million** overnight visits

0.6 **million** nights in the area as a result of overnight trips

£100 **million** spent by tourists during their visit to the area
£8 **million** spent on average in the local economy each month.

£33 **million** generated by overnight visits
£67 **million** generated from irregular day trips.

£130 **million** spent in the local area as result of tourism, taking into account multiplier effects.

2,272 **jobs** supported, both for local residents from those living nearby.
1,892 **tourism jobs** directly supported
380 **non-tourism related jobs** supported linked to multiplier spend from tourism.

Appendix I - Introduction about Cambridge Model

This report examines the volume and value of tourism and the impact of that expenditure on the local economy. The figures were derived using the Cambridge Economic Impact Model and the research was undertaken by The Research Solution.

The model utilises information from national tourism surveys and regionally based data held by The Research Solution. It distributes regional activity as measured in those surveys to local areas using 'drivers' such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level.

Limitations of the Model

The methodology and accuracy of the above sources varies. The results of the model should therefore be regarded as estimates which are indicative of the scale and importance of visitor activity in the local area. It is important to note that in the national tourism surveys the sample sizes for each area changes year on year. This is as a result of the random probability nature of the methodology. As such, the results of the Cambridge Model are best viewed as a snapshot in time and we would caution against year-on-year comparisons.

It should be noted that the model cannot take into account any leakage of expenditure from tourists taking day trips out of the area in which they are staying. While it is assumed that these may broadly balance each other in many areas, in locations receiving significant numbers of day visitors from London, there is likely to be an underestimate in relation to the number of overseas day visitors staying in holiday accommodation in London.

Whilst it is important to be aware of these issues, we are confident that the estimates we have produced are as reliable as is practically possible within the constraints of the information available.

Rounding

All figures used in this report have been rounded. In some tables there may therefore be a slight discrepancy between totals and sub totals.

Data sources

The main national surveys used as data sources in stage one include:

- Great Britain Tourism Survey (GBTS) - information on tourism activity by GB residents;
- International Passenger Survey (IPS) information on overseas visitors to the United Kingdom;
- Day Visits in the annual Great Britain Day Visitor Survey using information on visits lasting more than 3 hours and taken on an irregular basis

These surveys provide information down to a regional level. In order to disaggregate data to a local level the following information sources are used:

- Records of known local accommodation stock held by The Research Solution;
- VisitEngland's surveys of Visits to Attractions, which provide data on the number of visitors to individual tourist attractions ;
- Registrar General's estimates of resident population as based on the 2011 Census of Population;
- Selected data from the 2011 Census of Employment;

Staying Visitors

The GBTS provides information on the total number of trips to the region and the relative proportions using different types of accommodation. By matching these figures to the supply of such accommodation, the regional average number of trips per bedspace or unit of accommodation can be derived. The IPS provides information on the total number of trips by overseas visitors to the region.

Day Visitors

Information on day trips at the regional level is available from the Day Visits in Great Britain survey. The survey includes all leisure-related trips from home. It should be noted that a large proportion are local trips made by people resident in the locality. The model uses information from the survey to estimate the number of longer day trips (defined as those lasting at least 3 hours and involving travel of more than 20 miles) and irregular trips lasting more than 3 hours.

Impact of tourism expenditure

This section examines the impact of the tourism expenditure in terms of the direct, indirect and induced expenditure as well as an estimate of the actual jobs (both direct and indirect) supported by tourism expenditure in the district.

The GBTS, IPS and Day Visits to Great Britain survey data on the breakdown of visitor spending. The impact of this initial round of expenditure will be subsequently increased by multiplier effects. These arise from the purchase of supplies and services by the businesses in receipt of visitor expenditure (indirect impacts), and by the income induced-effects arising from the spending of wages by employees in the first round of business and in subsequent expenditure in supplier business (induced impacts).

The New Earnings Survey which provides information on wage levels by industry sector and region; An internal business database which includes data on the structure of business expenditure, local linkages and multiplier ratios drawn from a wide range of business and economic studies carried out by Geoff Broom Associates, PA Cambridge Economic Consultants and others. By applying the breakdown to the estimates of visitor spending, the model generates estimates of total direct spending.

Evidence from national studies suggests that some minor adjustments are required to match visitor spend to business turnover – for example, some expenditure on food and drink actually takes place in inns and hotels that fall in the accommodation sector and within attractions. More significantly, expenditure on travel costs associated with individual trips is equally likely to take place at the origin of the trip as the destination. Therefore the model assumes that only 40% of travel expenditure accrues to the destination area.

Number of full time job equivalents

Having identified the value of turnover generated by visitor spending, it is possible to estimate the employment associated with that spending. Wages for staff and drawings for the proprietors will absorb a proportion of that turnover. By applying these proportions to the overall additional turnover in each sector, the amount of money absorbed by employment costs can be calculated.

The New Earnings Survey provides data from which the average costs by business sector, adjusted to take account of regional differences, can be calculated. After allowing for additional costs such as National Insurance and pension costs, an average employment cost per full time equivalent job can be estimated. The number of such jobs in the local area can then be estimated by dividing the amount of business expenditure on wages and drawings by the average employment cost per job.

Number of Actual Jobs

The model generates estimates of full time equivalent jobs based on visitor spending. However, the total number of actual jobs will be higher when part time and seasonal working is taken into account. The full time equivalent jobs arising directly from visitor spending are converted into actual jobs using information from business surveys in the sectors receiving visitor spending. In general, the conversion factor varies around 1.5 in those sectors.

The indirect and induced jobs arise across a much wider range of employment sectors. Therefore, the average 1.16 for all sectors based on Census of Employment data has been used to convert full time equivalent jobs in this sector to actual jobs.

The employment estimates generated by the model include both self employed and employed people supported by visitor expenditure. The model also includes an estimate of the additional jobs arising in the attractions sector, which are not related to visitor expenditure. However, the numbers do not include other tourism-related employment such as jobs in local authorities arising from their tourism functions, e.g. tourist information staff, additional public health, parks and gardens, public conveniences, maintenance sections and jobs arising from capital investment in tourism facilities.

Trips, Nights and Spend (Definitions)

‘Trips’ are classified as trips or journeys away from home involving an overnight stay, taken by adults aged 16 and over and accompanying children aged up to 15. Each adult or child present on the trip counts as a trip, for example, a family of 2 adults and 2 children taking a trip away would count as 4 trips.

‘Nights’ are the number of nights away taken by adults and accompanying children on these trips. Each night away spent by an adult or a child present on the trip counts as a night. Thus, a family of 2 adults and 2 children taking a 3 night trip away from home would count as 12 nights.

‘Spend’ is the expenditure relating to these trips. It includes costs paid in advance of the trip, costs paid during the trip itself and also any bills relating to the trip received after returning home. It covers costs paid by adults on the trip for themselves and on behalf of others on the trip, including children. It also includes costs paid on behalf of the person taking the trip, such as an employer paying the cost of a business trip.

Produced by:

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APPENDIX D: Additional Self Catering Properties from online booking sources

Tripadvisor additional 8 units, 14 bedrooms, sleeps 29 people

Apartments in Rugby (also www.holidaylettings.co.uk/rugby/ [is owned by tripadvisor])

Float by Boat narrowboat retreat, 3 Bedrooms, Sleeps 6

Magnolia House (Coventry Rugby), 3 Bedrooms, Sleeps 6

Primrose Cottage, Brinklow, 2 Bedrooms, Sleeps 4

Room in Rugby- town centre, 2 Bedrooms, Sleeps 4

Armada boat hire – Hector and Jack x2 , Newbold, 1 bedroom, Sleeps 3

Tweedledee Coach House, Brandon, 1 Bedroom, Sleeps 2

Tweedledum Coach House, Brandon, 1 Bedroom, Sleeps 2

Avonview Studio Flat, Brandon, 1 Bedroom, Sleeps 2

Booking.com additional 6 units, 12 bedrooms, sleeps 27 people

Pumpkin Cottage, Newnham Paddox, 3 bedrooms, Sleeps 8

Honeysuckle Cottage, Brinklow, 2 Bedrooms, Sleeps 4

The Bull's Head, Brinklow 3 bedrooms, Sleeps 6 newly listed February 2017

Simpson's Apartments Rugby, 2 bedroom apartment, Sleeps 4

And 1 bedroom apartment, Sleeps 3

Church Court Apartments, town centre, 1 bedroom apartment, Sleeps 2

Sykes Cottages

Primrose Cottage, Brinklow (as on Tripadvisor listing)

Cottages.com (formerly cottages4you)

Rugby in the search filter generates nil responses. Enter Warwickshire and map produces:

Pumpkin Cottage, Newnham Paddox (as on booking.com listing)

HomeAway

There are limited distinctively different properties, but one example is available through HomeAway, on the edge of Braunston. Ivy House is a stunning Georgian manor in 6 acres, indoor swimming pool complex with 7 bedrooms, sleeps 18 people.   4.9/5.0 rating

Also, Duck Pond Barn, Stretton-on-Dunsmore, 2 bedrooms, sleeps 4

A typical visitor comment "Ivy House is well situated in pleasant countryside with good access. This was important for our family which came together from various locations within a 120 mile radius."

Such large properties fit well with the identity of the Rugby area being centrally located and well connected for people to travel to.

AirBnB

The sites, not seen on www.therugbytown.co.uk/ are:

Monks Kirby, The Annexe at the Almshouses, 2 beds/ 1 room

Near Harborough Magna 1 bed/ 1 room in owner's cottage

Clifton upon Dunsmore The Saddlery (Self-contained B&B), 1 double bed/ 1 room

Clifton upon Dunsmore The Dairy (Self-contained B&B), 1 double bed/ 1 room

Rugby, self-contained garden studio, 2 beds/ 1 room

Tweedledum Coach House, Brandon, 1 bed/ 1 room

Stretton-on-Dunsmore, Self Contained Lodge 1 bed/ 1 room

The Old Cottages at Eathorpe Hall - Aster Suite, 1 bed/ 1 room (500m into Stratford-on-Avon district)

Frankton, room in family home, 1 bed/ 1 room

Dunchurch, Annexe @ Guy Fawkes House (self-contained B&B), 1 bed/ 1 room

Dunchurch, Annexe in house (self-contained), 1 bed/ 1 room

Dunchurch, Top Floor, The School House, 2 beds/ 2 rooms

Dunchurch, owner's home, 1 bed/ 1 room

In total, these account for 13 properties, 14 rooms and approximately 22 bedspaces (depending upon single or double bed status).

Rugby Tourism Business Survey

Final Report, May 2017

Prepared by: The Research Solution

Christine King, Director

Tel: 01905 721440

On behalf of Rugby Borough Council

CONTENTS

1.0 INTRODUCTION AND METHODOLOGY

1.1 Introduction and Methodology

An online Business Survey was produced in March 2017, the content having been developed with the Council. The target audience was the breadth of businesses identified with the visitor economy in both town and countryside locations around the entire borough.

The introduction to take part was sent to all business contacts from the Economic Development team, Visitor Centre, Museum and Art Gallery and Rugby First, in order to reach a wide range of operators, including the cultural sector. It is estimated that this a total distribution of over 200 businesses.

A link was provided to a self completion online survey site, with responses automated and confidentially sent to the researchers.

After a month, with two reminders, a total of 24 responses were received. This is a disappointing figure, and may partially be a reflection on the low level of strategic engagement that there is currently with the industry by the local authority. The structure of the survey does allow for future use again to monitor change.

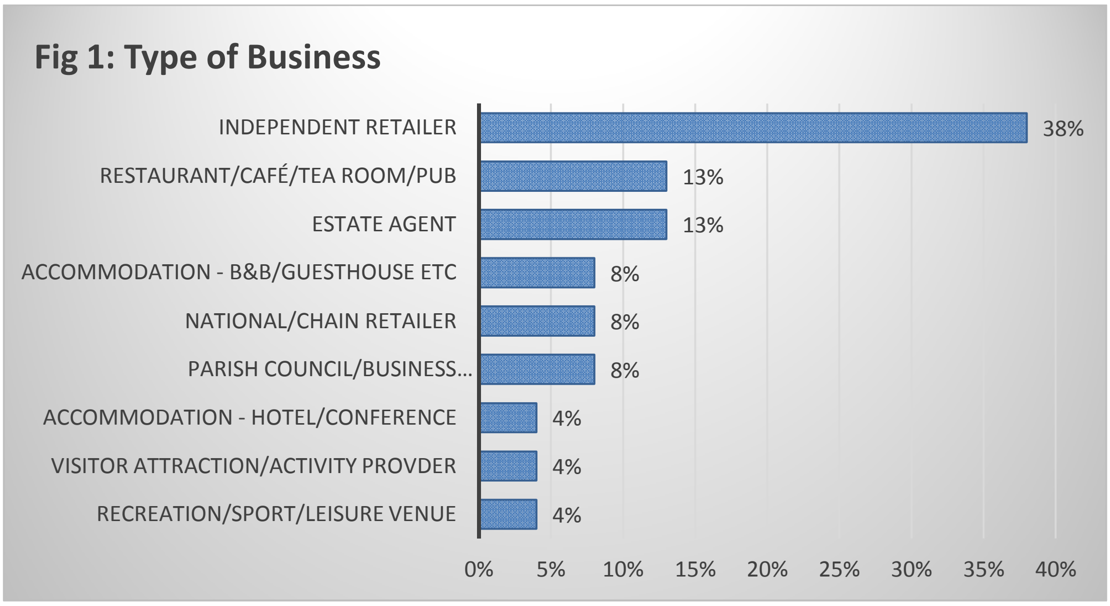
1.2 Notes to the reader

- All percentages are rounded to the nearest whole figure so on occasions figures may not exactly equal 100%
- A “0” indicates a value of less than 0.5%
- A dash (-) indicates no value.

2.0 RESULTS

2.1 Summary of Results

Respondents were asked to indicate their main type of business. Over a third (38%) described their business as an independent retailer, followed by restaurant/café/tea room/pub and estate agent, 13% respectively.

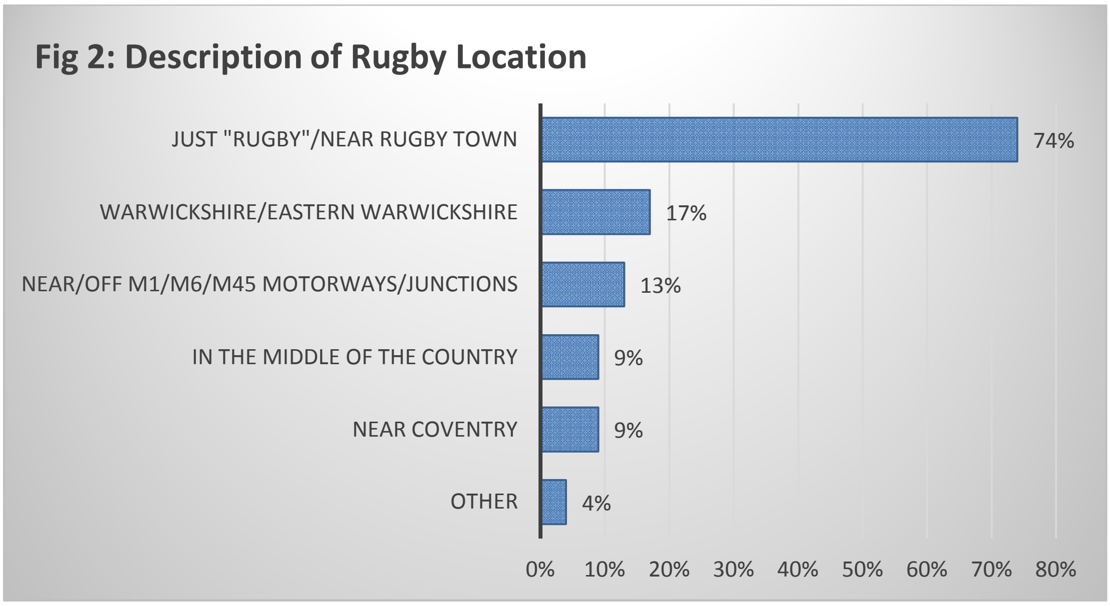


2.2 Location of Business

The location of businesses in the Rugby area were all located between the M6 and A45/M45 which included Rugby and Dunchurch. None of the businesses who had responded to the question were based north of the M6 or South of the A45/M45.

The majority (83%) of businesses were located in Rugby Town with the remainder based in a countryside/village location (17%).

Businesses were also asked how they would describe their location when explaining to someone from outside the area who were unfamiliar with Rugby. Most, 74%, noted it as being just 'Rugby', or near Rugby town. Other comments reflected the edge of the county, or proximity to motorways and major trunk roads.



2.4 Number of years' operating business

Just under a third of all businesses responding had been operating their business for over 21 years (33%), whilst 21% had been in business for 6-10 years. One quarter were less than 5 years old.

Table 1: Number of years in Business	**(24)**
Over 21 years	33%
11-20 years	17%
6-10 years	21%
2-5 years	8%
Less than 2 years	17%
Don't know	4%

2.5 Awareness of Promotional Resources

Awareness of the resources available was mixed. Businesses were most aware of the www.rugbytowncentre.co.uk website (79%) and the Enjoy Rugby printed visitor guide (50%). There was a low level of awareness of other website resources including: www.shakespeares-england.co.uk (21%), www.enjoyrugby.co.uk and www.enjoyrugby.co.uk (33% respectively).

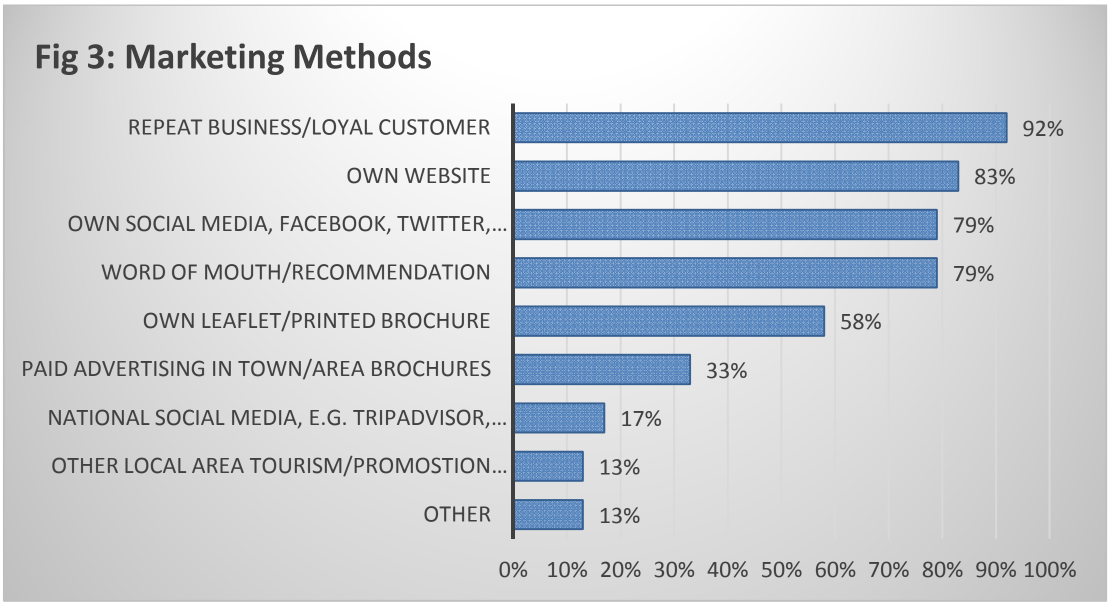
Table 2: Awareness of resources available

	Yes	**No**	**Don't Know**
Enjoy Rugby printed Visitor Guide	50%	50%	-
www.enjoyrugby.co.uk	33%	63%	4%
www.rugbytowncentre.co.uk	79%	17%	4%
www.therugbytown.co.uk	33%	63%	4%
www.visitcoventryandwarwickshire.co	33%	58%	8%
www.shakespeares-england.co.uk	21%	67%	13%

2.6 Marketing Methods

The most common method of marketing used by tourism businesses in Rugby was repeat business/loyal customers (92%). Over eight out of ten (83%) of businesses used their own website to promote and market their business. Use of social media such as Facebook, Twitter and Instagram was noted by 79% of businesses with a further 79% citing word of mouth/recommendation as their main marketing method.

There was a low use of other local area tourism/promotional websites/social media with only 13% using this method for their marketing. This included Rugby independents and the Parish magazine.

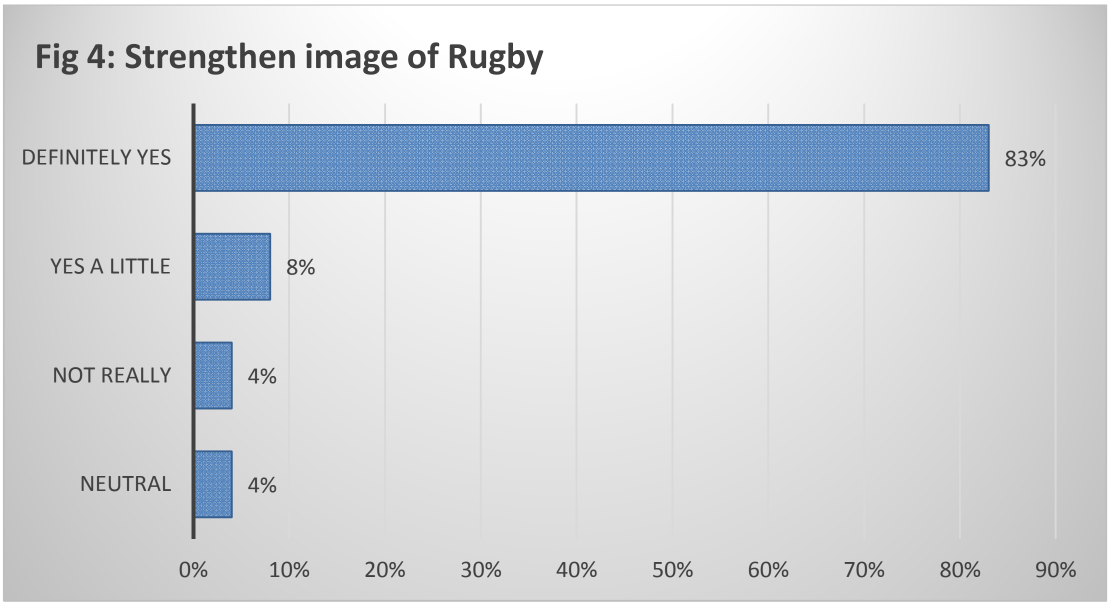


Businesses who had paid for advertising in the tourism/town/area brochures has used Village Emporium, Rugby Register, Allsorts Magazine and Farmstay.

Other marketing methods included: own email campaigns, Chamber of Commerce and Warwickshire networking events and attendance at shows, fairs, events and use of a PR company.

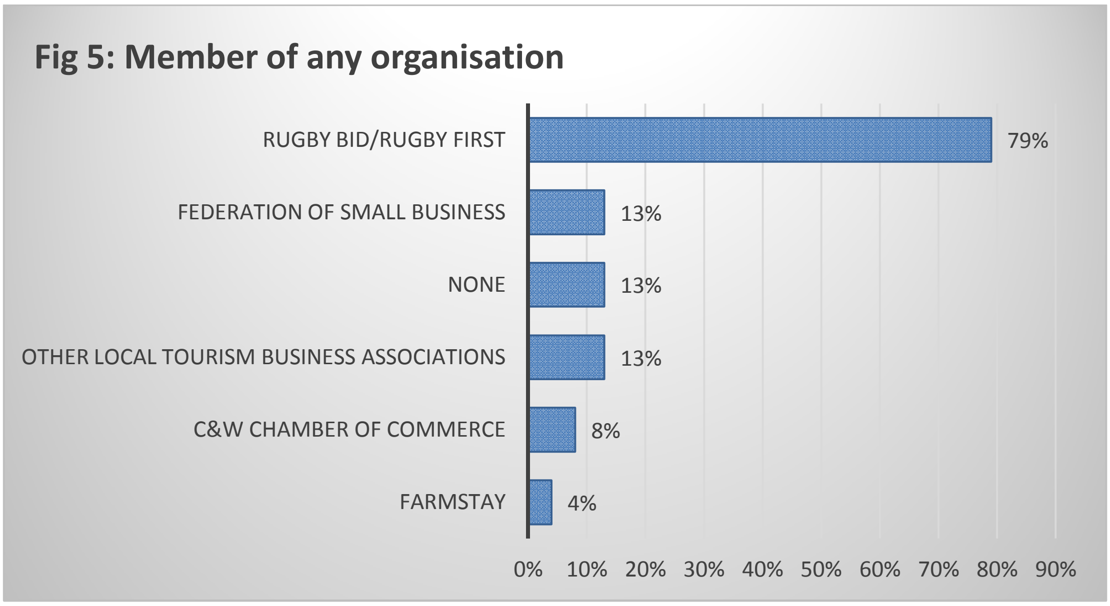
2.7 *Image of Rugby*

Businesses were asked if they felt there was a need to strengthen the image and branding of Rugby area for visitors. The majority, 83% definitely felt that this was needed. Smaller numbers said yes a little (8%) with not really and neutral responses from 4% of businesses respectively.



2.8 *Organisation Membership*

Almost eight out of ten businesses (79%) were a member of Rugby Bid/Rugby First. Smaller numbers noted membership of other local tourism business associations (13%), Federation of Small Business and not a member of any other organisation – 13% each.



8% of businesses were a member of the Coventry and Warwickshire Chamber of Commerce.

Of those who had noted membership of other local tourism business associations, these included; BNI Rugby Business Networking, Round Table, Freemasons, Rugby Independents and Socially Shared.

2.9 Percentages of Customers as Locals/ Visitors and Repeat

Businesses estimated the approximate split in their customer base between local people and tourists/ visitors. The following is an insight from the respondents based upon the nature of who replied to the survey and their knowledge of customers using their organisation.

Approximately four out of five customers are perceived to be local people (81%), and one in five (19%) as tourists/ non-locals visiting the area. For some businesses/ respondents, the local market was 90% or more. A few businesses felt that up to 50% of their trade came from tourists.

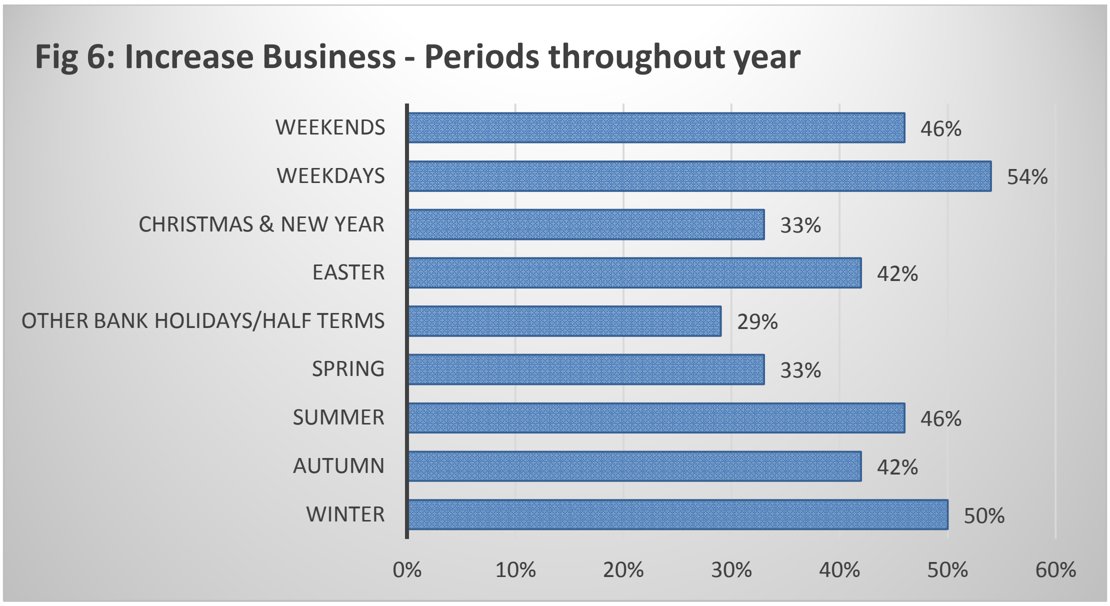
Similarly, estimates were made as to the new and repeat basis of customers by the respondents.

Approximately 63% of customers were felt to be repeat, and 37% new/first time to the business. A couple of businesses perceived that virtually all their trade was from repeat customers, whilst one business felt almost everybody was new.

2.10 Times of Week/Year desire for an Increase in Business

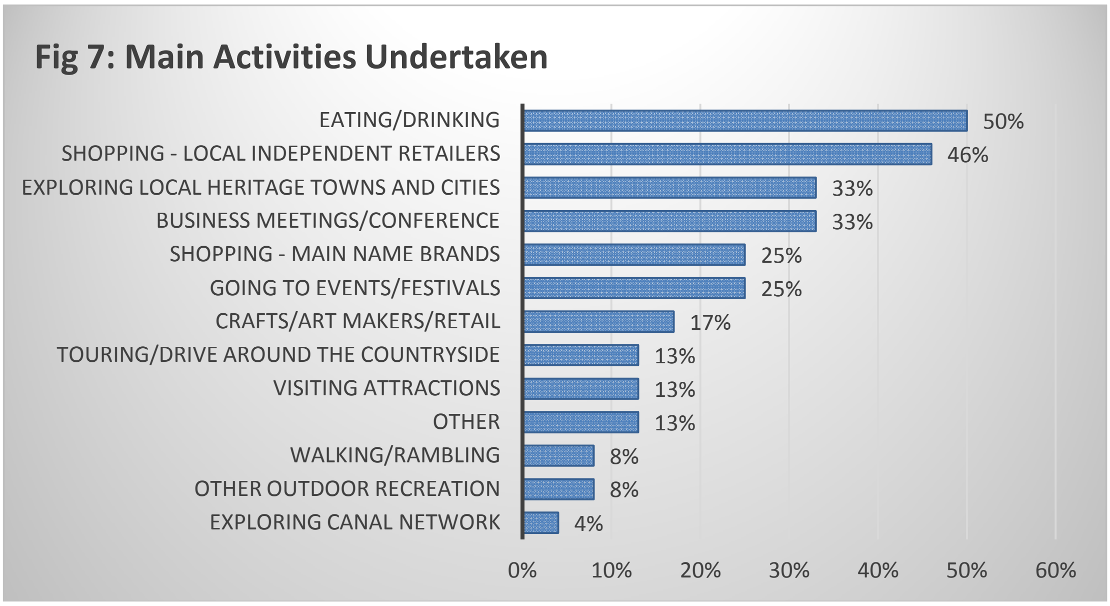
Businesses were asked if there were any particular times of the year when they would like to see sales in the business increase. Over half of all businesses would like to see an increase in their business during the weekday (54%) and in the winter months (50%). 46% would like more weekend and summer business – which would be good times for tourism leisure activity.

Business during other bank holidays/half terms were less in need of additional business than at any other time of the year with only 29% stating they would like more business during these periods.



2.11 *Main activities undertaken*

A view was provided by the businesses as to the activities that their customers engaged in. It was felt by half of all businesses that visitors who go to Rugby will make use of the eating and drinking venues within the area (50%). Shopping in local independent retailers account for 46% of activities undertaken, followed by exploring local heritage towns and cities and attending a business meeting or conference (33% respectively).



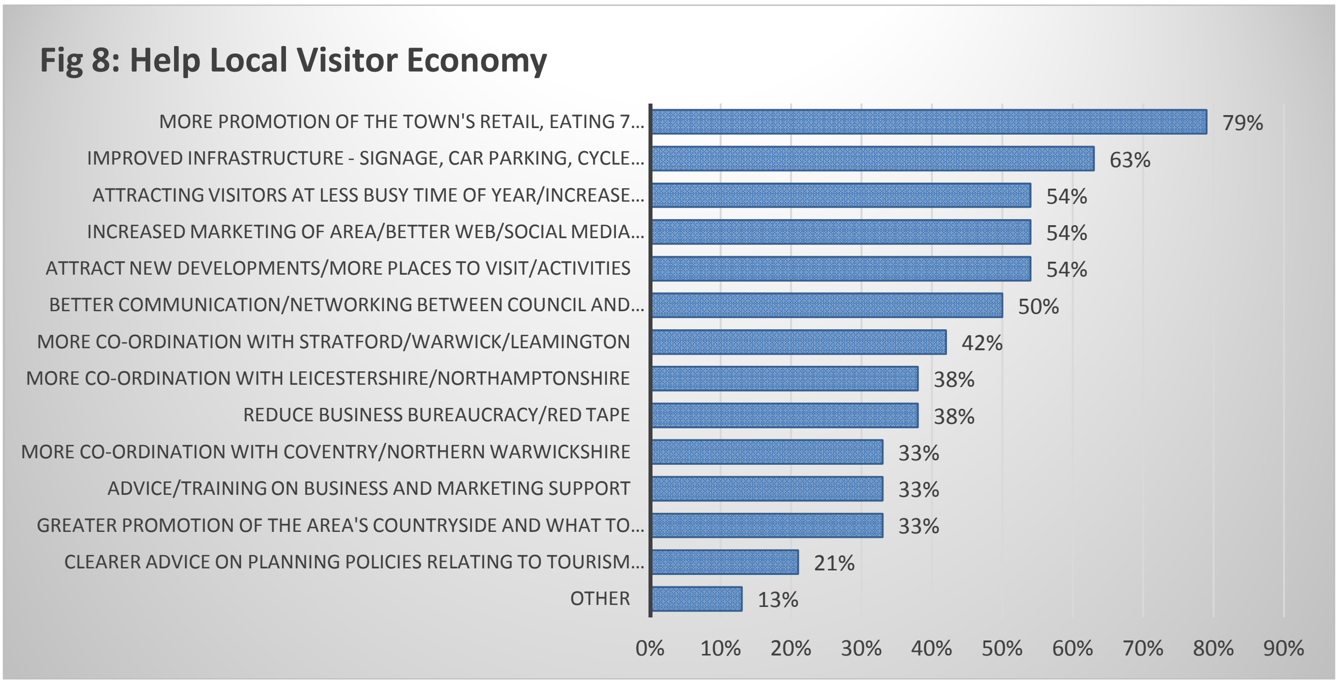
Smaller numbers indicated that their visitors shop in the main name branded shops or go to events/ festivals – 25% each.

Smaller proportions would explore the countryside (13%) or visit attractions – partly a reflection of the nature of the town centre businesses that responded to the survey.

2.12 *Actions to help the local visitor economy*

Businesses felt that they would like to see more promotion of the town's retail, eating/drinking and events on offer (79%). The improved infrastructure of the town was a key action that businesses would like to see with almost two thirds (63%) citing this as an important action to help the local visitor economy.

Just over half (54%), commented on wanting to attract more visitors throughout the year, at quieter times; a better marketing and social media presence; and to attract new developments and more places to visit. Half wanted to see more communication and local partnership in tourism.



"Other" comments included free or reduced cost of parking, make Rugby a whole town, aim higher and unite all the local voices.

2.13 Increase in business over last 3 years

Almost 4 out of 10 businesses (38%) felt that their business has grown a lot or grown a little over the last three years of trading. This was countered by three in ten businesses felt that their trade had declined a lot or a little during this period (30%).

Table 3: Increase in business over last 3 years	**(24)**
Grown a lot	25%
Grown a little	13%
Stayed the same	17%
Declined a little	17%
Declined a lot	13%
Don't know/can't say	4%
Not applicable	13%

2.14 Factors affecting business

Businesses were asked what they thought were the main factors that had affected their business during the last three years. Competition from other providers/destinations and the cost of business rates and operations were the two main factors highlighted by businesses (42% each).

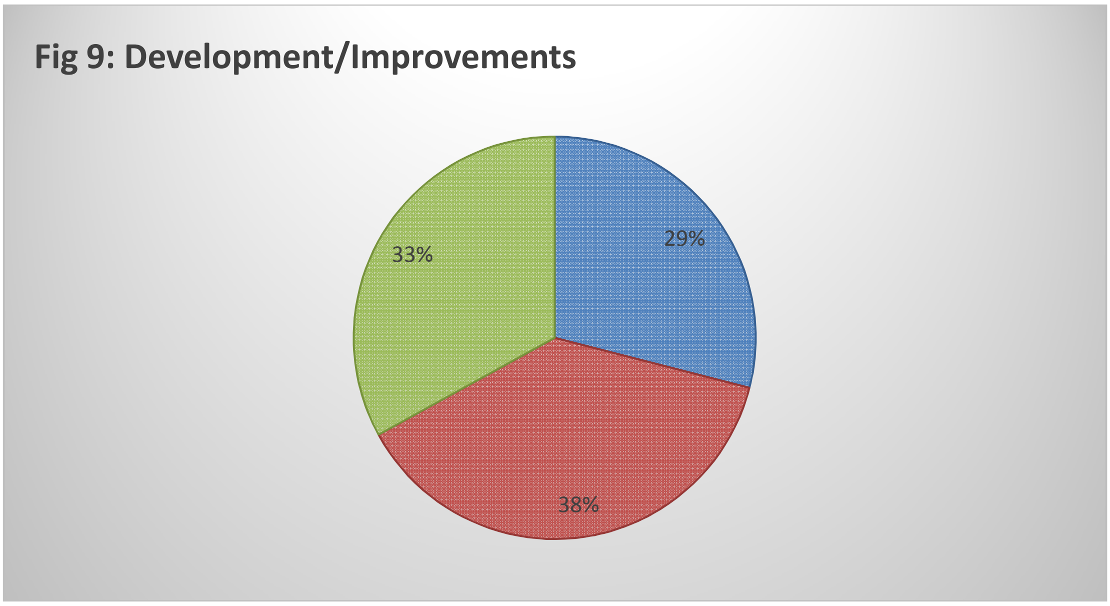
The continuing austerity/spending less/belt tightening was an issue for almost three out of ten businesses (29%).

Table 4: Main factors affecting business	(24)
Competition from other providers/ destinations	42%
Business rates/ cost of operations	42%
Other	33%
Austerity/ spending less/ belt tightening	29%
Venue or destination marketing / promotion	25%
Not enough UK tourists /less frequent trips made	21%
Weather conditions	17%
Recruiting/ retaining staff	13%
Sterling exchange rate positive for overseas visitors	8%
Legislation/ red tape	8%
Cost of fuel/travel	-

Those who had noted other reasons include; new to business so unable to comment, closure of businesses, property market, opening of out of town development has affected trade in town, closure of M&S store and no free parking.

2.15 Development/improvement plans

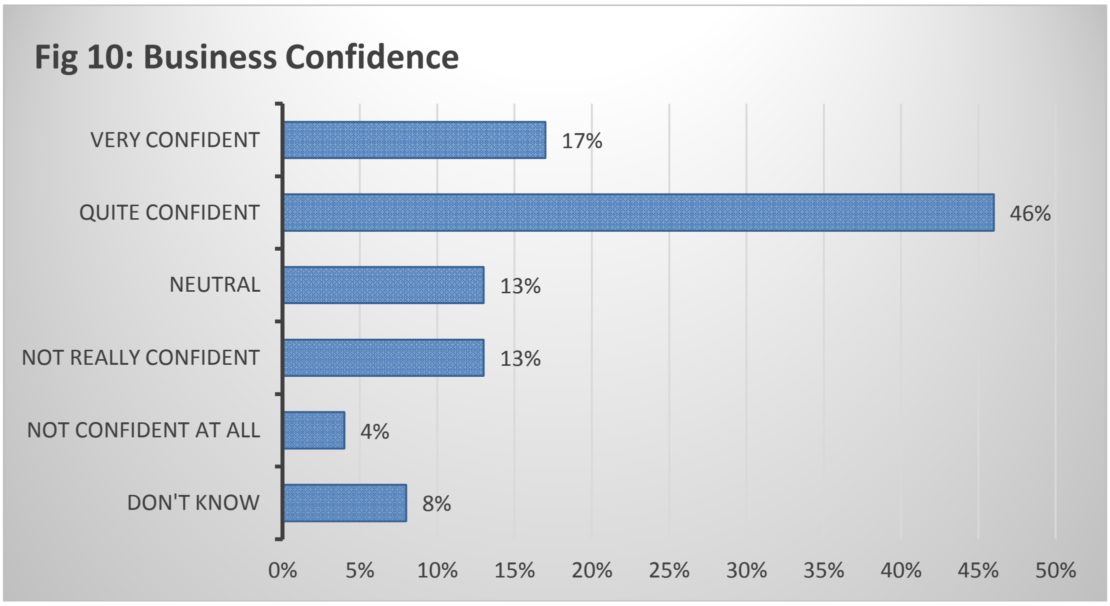
Looking ahead, there was a fairly even split of businesses who had plans to improve or extend their business. Over a third (38%) were planning improvements or extensions to their business, 29% were not planning any improvements in the near future. A third, 33% were unsure of their plans.



Those businesses who had indicated they would be making improvements or extending their business were asked what they were intending to do. A change of premises, refurbishment/shop refit, increasing number of clients, increased focus with on-line sales, upgrading of toilet facilities and a new security system were noted by respondents.

2.16 *Business Optimism*

Almost two thirds of businesses were quite/very confident (63%) compared with 17% who did not feel confident or optimistic about their business.



2.17 *Number of Employees & staff recruitment*

Generally respondents indicate micro-businesses providing feedback. Almost a third (32%) employed 2-5 full time employees, and 18% with 1 person, followed by 27% who did not employ any full timers.

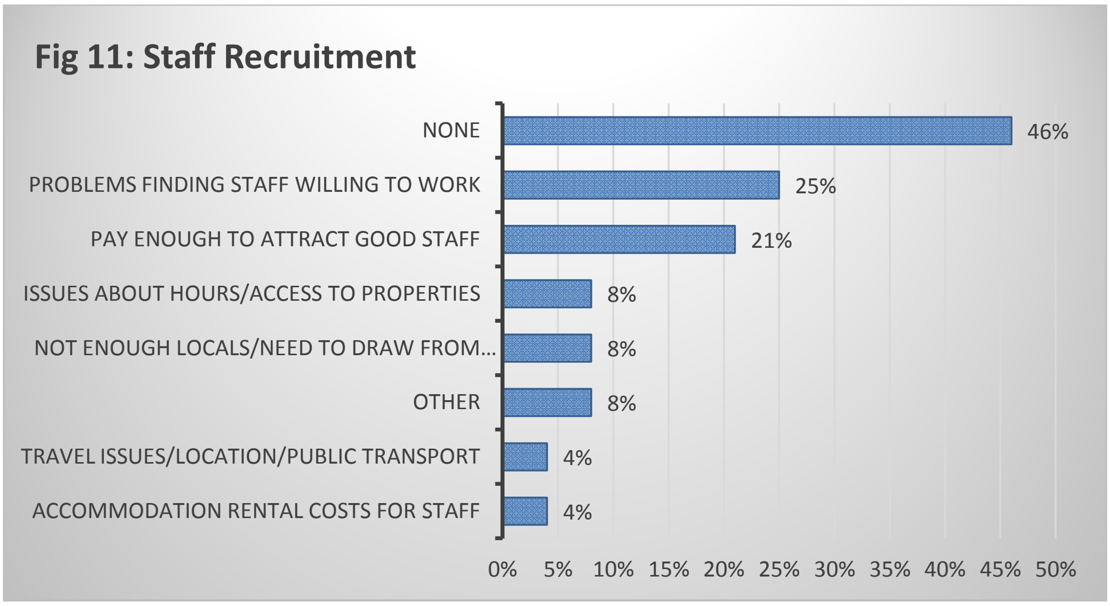
35% of businesses employed only 1 person on a part-time basis. A quarter of businesses (25%) employed 2-5 members of staff who were part timers.

Only 5% (1 business) employed more than 20 people.

Table 5: Number of employees

	Full time	***Part time***
None	27%	15%
1	18%	35%
2-5	32%	25%
6-10	14%	15%
11-15	-	-
16-20	5%	5%
21-30	-	-
30+	5%	5%

Almost half of all businesses did not have any problems in recruiting staff (46%). Those that did, had problems finding staff willing to work (25%) and paying enough to attract good staff (21%).



Other issues mentioned in smaller numbers included; issues about hours/access to properties, not enough locals/need to draw from further afield and "other" reasons – 8% respectively. The comments relating to other reasons were around parking for staff and shop owners.

2.18 Development of urban and rural tourism in Rugby Borough

Business were asked what the top 3 priorities would be for developing urban and rural tourism in Rugby Borough. Not all comments reflect only tourism issues and thoughts, many priorities would influence the town and area as a destination for local people too. In their own words they suggested:

- Getting people into the town centres, not just out of town retail parks
- Reduce traffic congestion
- Improve Roads into town traffic is dreadful
- More shops in the town centre
- Faster development of Town Centre
- Rugby sport connection
- More to do, better venues
- Getting rid of Asda and creating a museum/attraction in its place
- We need to attract people to Town Centre, free parking
- Rugby is the home of Rugby Football. Everyone should know this!
- Proper coach park and promotion at trade shows for tourism
- More attractions
- Make people aware of Rugby and its independent shops, restaurants and that Rugby is not just a collection of retail parks
- Public service/transport should be addressed from other towns into rugby
- Better shops (not just independents - that's a myth - we need good adjacencies to pull people in not charity and pound shops)
- Improving town centre
- Great awareness of Small Businesses that are independently owned
- Keeping all your tourist providers in touch with events and each other
- More town centre shops

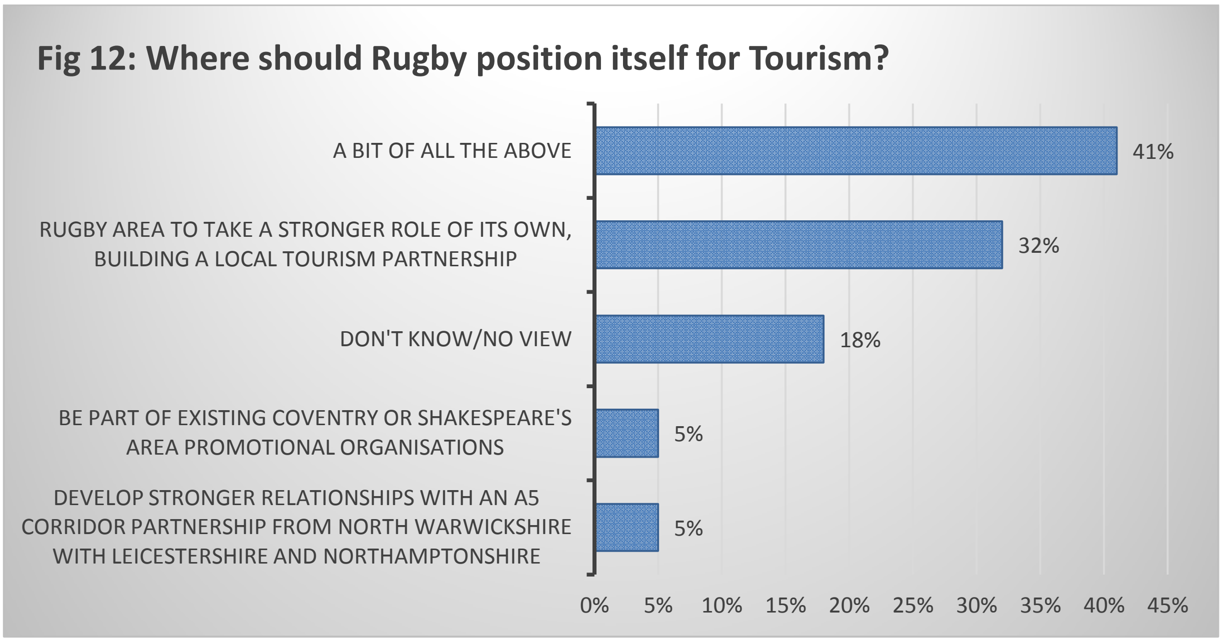
- Encourage coach trips to stay longer in the town, providing information on what's in the town centre
- Reduce parking charges
- Coach Park
- Free car parking
- More investment in town centre/high street
- History of the town
- Create an experience that lasts the day
- Encouraging more independent traders into the town
- Fill empty units
- Rugby Town is getting worse and worse, rates are too high and decent shops are being driven away from the town centre
- More marketing
- Investment in town centre, both sides of town centre need to be more connected
- Develop the old M&S store – an arcade would be great. Maybe put the market, start-ups and artisans in there
- Think out of the box for development
- Praise the great countryside with walks, canals and attraction of Stratford and Leamington
- I think huge strides have been made in promoting Rugby as a town in the last two to three years but I don't feel that we are proud enough of what we have and that the "Town" promotes us as providers of hospitality and can really be of use to outsiders coming to Rugby that need all different types of accommodation.
- Dropping rates for shops
- Promote the Rugby football angle more and make sure the rest of the town gets a mention
- Reduce the number of charity shops and encourage more independent retailers to the town
- Improve town centre; more independent shops, craft markets, farmers markets every week.
- Get rid of anti-social behaviour around Clock Tower/McDonalds
- More town centre marketing
- More marketing investment
- Natural attractions, Draycote etc.
- Transportation and infrastructure
- Developing an indoor market to attract local crafters into the town (possibly at the old Brotherhood House)
- Reduce rates to get new businesses in empty units
- Rugby School should also be a tourism consideration
- More events
- Create a capable team to encourage outside investment from meaningful brands that add something and speak/promote with one voice not all these sub-groups of networkers and action groups
- Enhance the idea that Rugby is less than an hour on the train!! Create a new market of investment, infrastructure and distribution
- Be part of a Rugby tourism website
- Free or lower price parking

2.19 Where should Rugby position itself for tourism?

Businesses were asked where they felt Rugby should position itself in regard to tourism. Three prompted positions were given; 41% of respondents felt that it was a combination of all 3 priorities stated in the question.

Taking a stronger role of its own and building a local tourism partnership for Rugby was felt to be important in terms of positioning the area for tourism (32%).

There was less positivity for staying with the existing promotional organisations of Coventry and Shakespeare's area or in developing a stronger relationship with partners in North Warwickshire, Leicestershire and Northamptonshire – 5% each.



Business were then asked the reasons behind their views, responding:

Don't really know what would work
Rugby council has let us all down No vision in the past Make most of Rugby School links Towns heritage buildings Home of Rugby And lots more!
Let's be proud of our own heritage.
Rugby is a growing town and should look after its own destiny. Partnerships are rarely fair and generally the larger party gets the greater benefit.
we should have exploited our Rugby game connections well before now, Rugby should be destination for tourists
Because of the history and beautiful buildings
Because Rugby has the potential to be a destination in its own right.
Communication is all
At the moment, there is a lot of potential with the A5 band and other major routes. the partnership should be able to attract and retain new businesses and create a niche market for being the Centre of England (Heart of Warwickshire)

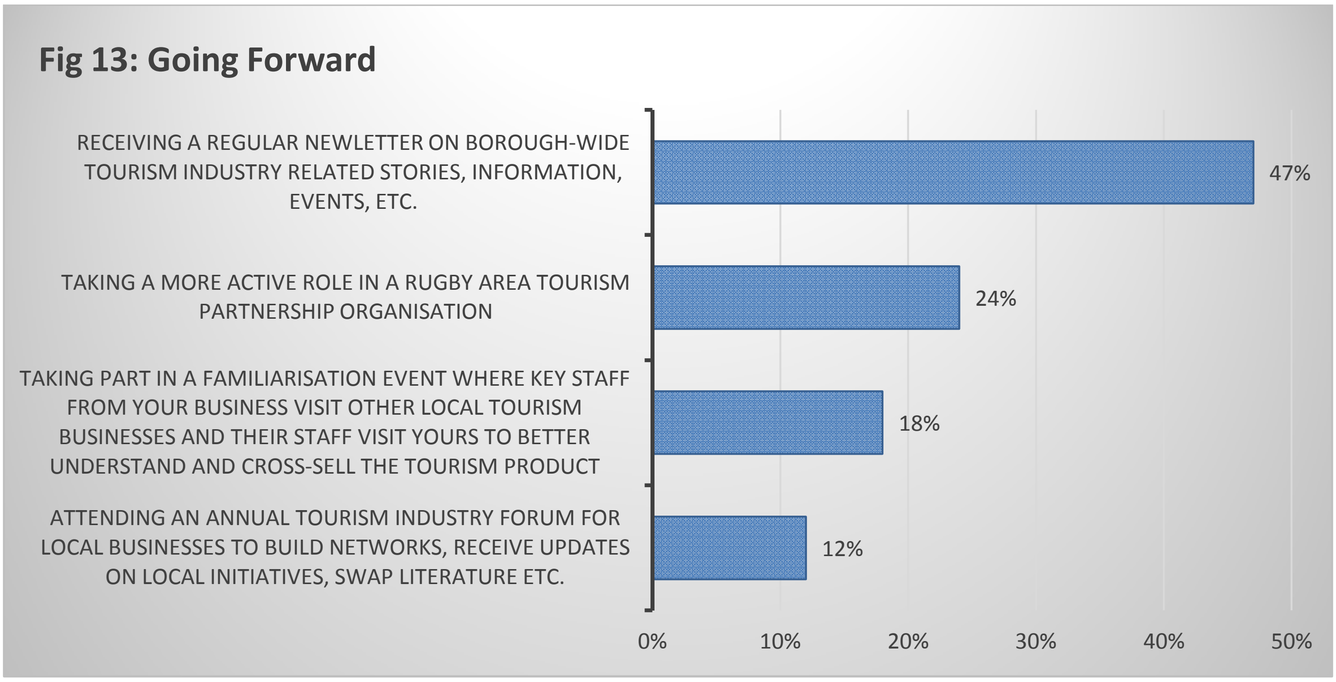
2.20 Going Forward

Businesses were asked if they would be interested in a range of activities going forward.

Almost half of all businesses (47%) were keen to receive a regular newsletter on borough-wide tourism industry related stories, including information, events etc.

One quarter (24%) were interested in taking a more active role within a Rugby area tourism partnership group. One in six (18%) were willing to be part of a cross-business/site familiarisation event.

There was some, but less support for attending an annual tourism industry forum to build networks and swap literature etc. (12%).



3.0 APPENDIX- QUESTIONNAIRE

The following is the text used and imported into the online survey format, which was presented in a reader friendly page by page layout.

1. How would you best describe your main type of business/ organisation?

1 Accommodation – hotel / conferences
2 Accommodation – B&B, guesthouse, inn, farm, etc
3 Canal boat/ marina
4 Retail – chain/national
5 Retail – independent
6 Visitor attraction / activity provider
7 Garden centre/ farm shop
8 Restaurant/ café/ tea room/ pub
9 Artist/ crafts / events
10 Food/drink producer/agriculture /estate
11 Recreation / sport/ leisure venue
12 Transport provider
13 Parish Council/ business organisation/ voluntary group, etc
14 Other
Please specify

Q2. Which area of Rugby borough and its fringes are you located in?

1 North of M6
2 Between M6 and A45/M45 (includes Rugby and Dunchurch)
3 South of A45/M45

Q3 Would you say your business is located in :

1 Town
2 Countryside/ village

Q4 Where/how do you describe your location when explaining to someone from beyond this area who is unfamiliar with Rugby? *(please tick as many boxes as appropriate)*

1 Just 'Rugby' / near Rugby town
2 Near/ off M1/ M6/ M45 motorways/ junctions
3 In the middle of the country
4 Near Coventry
5 Warwickshire/ eastern Warwickshire
6 Near Stratford-upon-Avon
7 Other
Please specify

Q5 How many years has your business been operating?

1 Less than 2 years
2 2 to 5 years
3 6 to 10 years
4 11 to 20 years
5 21+ years
6 Don't know

Q6	Are you aware of any of the following resources ?	Yes	No	Don't know
1	Enjoy Rugby printed Visitor Guide	1	2	3
2	www.enjoyrugby.co.uk	1	2	3
3	www.rugbytowncentre.co.uk	1	2	3
4	www.therugbytown.co.uk	1	2	3
5	www.visitcoventryandwarwickshire.co.uk	1	2	3
6	www.shakespeares-england.co.uk	1	2	3

Q7 Which marketing methods does your business mainly use or benefit from? *(please tick as many boxes as appropriate)*

1 Own website
2 Own social media – Facebook, Twitter, Instagram, etc
3 Other local area tourism/promotional websites / social media. Please name them
4 National social media/ websites eg tripadvisor, booking.com, gumtree, food blogs etc.
5 Own leaflet/ printed brochure
6 Paid advertising in tourism/ town/ area brochures. Please name them
7 Word of mouth/ recommendation
8 Repeat business/ loyal custom
9 Other. Please specify

Q8 On a scale from 1- definitely not at all to 5- definitely yes, do you feel that there is a need to strengthen the image and branding of the Rugby area for tourist visitors?

Definitely not	Not really	Neutral	Yes a little	Definitely yes	Don't know	Not Applicable
1	2	3	4	5	6	7

Q9 Are you a member of any of the following organisations ?

1 Rugby BID / Rugby First
2 Visit Coventry and Warwickshire
3 Shakespeare's England
4 Farmstay
5 Federation of Small Business
6 Coventry & Warwickshire Chamber of Commerce
7 Any Other local tourism /business association. Please name

Q10 **Roughly what proportion of your trade/ your customers would you say are repeat ?**

……… %age Don't know/ can't say

Q10a **Roughly how would you estimate your customer split?**

Local people ……… %age

Tourist/ visitors/ non-locals……… %age

To add to 100%

Don't know/ can't say

Q11 **Are there particular times of the week and the year when you would like to see more business?** (*tick all that apply)*

1	Weekends	6	Spring
2	Weekdays	7	Summer
3	Christmas & New Year	8	Autumn
4	Easter	9	Winter
5	Other bank holidays/half terms		

Q12 **What would you say are the main activities that your visitors take part in here?**

1 Touring/drive around the countryside

2 Exploring local heritage towns and cities

3 Visiting attractions

4 Exploring canal network

5 Shopping – main name brands

6 Shopping - local independent retailers

7 Crafts/ arts makers/ retail

8 Eating/ drinking

9 Business/ meetings/ conference

10 Going to events/ festivals

11 Walking/ rambling

12 Other outdoor recreation/ cycling, golf, fishing, sailing, etc

13 Other

Please specify

Q13 **What actions would you like to see to help the local visitor economy?** (*tick all that apply)*

1 Attracting visitors at less busy times of year/ increase length of season

2 Increased marketing of the area/ better web/ social media presence

3 Better communication/ networking between Council and tourism businesses

4 More co-ordination with Coventry/northern Warwickshire

5 More co-ordination with Stratford/ Warwick/ Leamington

5 More co-ordination with Leicestershire / Northamptonshire

6 Advice/ training on business and marketing support

7 Greater promotion of the area's countryside and what to do / activities/ walks

8 More promotion of the town's retail, eating/drinking and events

9 Improved infrastructure – signage, car parking, cycle routes, etc

10 Attract new developments/ more places to visit/ activities

11 Clearer advice on planning policies relating to tourism development

12 Reduce business bureaucracy / red tape

13 Other Please specify

Q14 Would you say that over the last three years your business has….?

Declined a lot	Declined a little	Stayed the same	Grown a little	Grown a lot	Don't know/ can't say	Not Applicable
1	2	3	4	5	6	7

Q15 What would you say have been the main factors affecting your business performance over the past two years?

1 Weather conditions

2 Venue or destination marketing / promotion

3 Not enough UK tourists /less frequent trips made

4 Austerity/ spending less/ belt tightening

5 Competition from other providers/ destinations

6 Recruiting/ retaining staff

7 Business rates/ cost of operations

8 Sterling exchange rate positive for overseas visitors

9 Cost of fuel/ travel

10 Legislation/ red tape

11 Other (please specify)

Q16 Do you have plans to improve, develop or extend your business in the next few years?

Yes GO TO Q17 No GO TO Q18 Not sure GO TO Q18

Q17 What type of investment or development are you planning?

Q18 Looking ahead, on a scale from 1 very negative to 5 very confident, what is your optimism and confidence for your business over the next two years?

Not confident at all	Not really confident	Neutral	Quite confident	Very confident	Don't know
1	2	3	4	5	6

Q19 How many people do you employ FULL TIME at this site?

None	1
1	2
2-5	3
6-10	4
11-15	5
16-20	6
21-30	7
30+	8

Q20 How many people do you employ PART TIME at this site?

None	1
1	2
2-5	3
6-10	4
11-15	5
16-20	6
21-30	7
30+	8

Q21 Can you describe any problems that you have recruiting and retaining staff?

None	1
Problems with travel to the site/ public transport/ location	2
Issues about hours/ access to properties	3
Hard to pay adequately to attract good staff	4
Problems finding staff willing to work	5
Accommodation / rental costs for staff	6
Not enough locals/ Need to draw staff from beyond this area	7
Other – please specify	8

Q22 What would you say should be the TOP 3 PRIORITIES for developing urban and rural tourism in Rugby borough?

A

B

C

Q23 Where do you think Rugby should position itself for tourism growth?

1 Rugby area take a stronger role of its own building a local tourism partnership

2 Be part of existing Coventry or Shakespeare's area promotional organisations

3 Develop stronger relationships with an A5 corridor partnership from North Warwickshire with Leicestershire and Northamptonshire

4 A bit of all the above!

5 Don't know/ no view

Q24 Why do you say this? Please comment on your views about partnerships and delivering for growth in tourism in this area.

Q25 Finally, would you be interested in…..

1 Attending an annual tourism industry forum for local businesses to build networks, receive updates on local initiatives, swap literature, etc

2 Receiving a regular e-newsletter on borough wide tourism industry related stories, information, events, etc

3 Taking a more active involved role in a Rugby area tourism partnership organisation

4 Taking part in a familiarisation event where key staff from your business visit other local tourism businesses and their staff visit yours to better understand and cross-sell the tourism product

Many thanks for your input. Press SUBMIT here.

APPENDIX F TOURISM WORKSHOP - AN A-Z OF RUGBY

A quick audience exercise generated an initial A to Z of the attributes of Rugby, town and country, that feeds into the product and strength review. In effect, the following observations on the A-Z of Rugby provide a succinct, albeit not definitive, overview of the key strengths of the product, amenities, personalities, connections, geographical attributes and various elements that blend together into the visitor economy of the borough.

A. Alpacas; Accessible, Ansty Hall hotel, Archaeology

B. Brandon Woods & Nature centre; Birthplace of rugby

C. Caldecott Park; Central position; crossroads; churches, canals; Coombe Abbey

D. Dunchurch Park Hotel; Dunchurch, Draycote Water & its cakes!

E. Engineering heritage

F. Friendliness; Frank Whittle; Festival of Culture (Fosse Way)

G. Guy Fawkes; Grand Union Canal; Gallery

H. Hall of Fame; history; holograms, holidays

I. Industrial heritage; independent music; intersection

J. Jet engine; John Stuart Stuart-Forbes

K. (Kilsby, King's Newnham)

L. Library; live music; Richard Lindon

M. Motorway; museum; motorbikes; merchants

N. near Naseby

O. Opportunities

P. Parks; Philharmonic choir; Pathway of Fame; pubs; (Polo at Onley Grounds)

Q. Quigleys

R. Rugby School; railway; Rupert Brooke; Romans; Ryton Pools; Rugby collection; (Ryton Gardens)

S. St Andrews; Shakespeare; (Speedway)

T. Twinning Association; Tripontium; theatres

U. USP

V. Vikings

W. William Webb Ellis; West Indian Club; Wasps

X. (X-roads M1, M6, A14)

Y. (yachting)

Z. Zinnia (flowers in Garden Organic!)

() denotes those we thought of after the workshop.

APPENDIX G DELEGATES TO WORKSHOP STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS - SWOT ANALYSIS

The workshop provided the forum to distil the earlier presentation and discussions, to begin to identity the Strengths, Weaknesses, Opportunities and Threats to the visitor economy of the borough.

Rugby Borough Tourism Workshop Initial SWOT Analysis by delegates

STRENGTHS

- Range of cafés/restaurants in town
- Clean, safe, friendly town!
- Transport networks
- Cheap parking £1 for 3hrs
- The town's history
- Being the birthplace of Rugby
- Worldwide awareness of rugby
- What came first rugby or Rugby!
- Engineering heritage has potential
- Hillmorton Locks is the busiest canal flight in the country.

WEAKNESSES

- Not everyone is interested in rugby. This association may turn some people off
- Low morale in town centre re trade
- Lack of DMP/ tourism structures giving vision and synergies
- There's a divide in town between the need for independents and need for brands: 1 town, 1 voice
- Not a huge amount of "things to do" related to the area's history.
- It's hard to get into town from the canal
- Poor transport links to rural areas
- The railway bridge restricts access to town
- Feeling that the town centre is weak due to charity shops etc
- Lack of clarity on brand, USP, what we stand for – fragmentation
- We don't aim high enough on new town centre retail
- There's little support for under 25s to develop in the arts/music as lack of venues
- Lack of consistency between the brand and its potential.

OPPORTUNITIES

- More international visitors seem to be coming. Potential for Chinese?
- But Chinese market 300k vs US 2m
- This is 1st step on the ladder there's masses of opportunity
- Local rugby clubs bringing in other teams every week - market to these
- Market to Wasps, Tigers, Saints
- Packaging Rugby tours, not just Hall of Fame, but school, places to eat etc
- The growth in population, some RBC residents never visit the town centre
- Use twinning associations links
- Elliott's Field brings in out of town visitors, need to hang onto them, draw them into town
- Strong events calendar & link to opportunities of the bigger area
- 9 million catchment 90 mins
- Advertise the area at Elliott's Field eg McArthurGlen (elsewhere) promotes surrounding area in vacant units
- Digital marketing using the good authentic stories
- Experiences not products
- Create reasons for people to come into town
- Tenants are taking over vacant units in town
- Proximity to London – speed of train

THREATS

- Town centre footfall down >25% in 2016; ongoing impact of Elliott's Field
- Many attractions are weather dependant – is there enough to do in the dry in the town or borough?
- Increased traffic due to growing population
- Close to London – drawing people away for trips
- Failing to aim high enough. It's a slow meandering death if we settle for poundshops etc.

APPENDIX H   TOURISM WORKSHOP – KEY ISSUES & EMERGING PRIORITIES

A group working session was then held, with each table of 7-8 people discussing for 15-20 minutes a topic, three in all, then moving onto the next topic, with a local authority moderator keeping the discussion going and on track, involving everyone. Using the prompts to keep the debate going, the key issues were noted and priorities identified. These are set out, in no specific order/priority.

Topic A: Making Rugby Borough a more compelling place to visit

Prompt points/questions:

Are there **enough things for people to do** / places to visit/ activities to take part in? What's missing?

Are the products/activities of **good enough quality** to satisfy a visitor? How should there be improvement ?

What puts off leisure visitors from coming here for a day/ evening out or overnight stay?

Which other **types of visitors offer growth potential** to the whole Rugby area?

So - what would make Rugby as a town and whole borough a **more compelling place to visit**?

Feedback - Highlight the top priorities & key actions to improve this.

Join up the rural/ countryside offer - Package the rural offer- Brandon, ancient woods, Coombe, Ryton Pools, Garden Organic, walking routes, cycle routes, villages, canals, Draycote Water

Package half day/ 1 day/ 2 days out packages and themes. Show something different. Could link with:

Create themed Trails = Culture. Rugby. Countryside. Water.

Better shops, better hotels – 'we all need to have a better offer - link with experiences

Signage - includes better signs/audit, 'adopt a noticeboard', Canals and River Trust directions to town

Exploit the day visitor market – work with the immediate access neighbours, better informed/ promoted to

Access for visitors – not welcoming, 'no welcome mat', be more coach friendly, training welcome to taxi drivers - get boaters to visit, help them, 'Boris bikes'

Make it easy – what is there to see and do

Events and Festivals – clear targeting, access to funding

Content and digital marketing – clear offer, use social media

Develop interactivity in the experience – including the physicality of rugby the game

Build a more unified packaged product

What is the USP? Find it – tell it

Make use of Elliott's Field opportunties of visitors, some of whom could be enticed into town for events/ different experiences

Is the quality there for the international visitor?

Is the town centre accommodation offer right?

World class Gallery/ Hall of Fame – so partner with other leading attractions in surrounding area

Promote more to residents – themselves and their visiting friends and families

Invest in arts projects/ experiences

Appear Here pop up empty shop initiative

Topic B: Networking/ partnerships and familiarity with the Borough tourism product

Prompt points/questions:

How well networked do you feel you are with other local businesses and organisations? Are these mainly within the town or across the borough?

If you don't work with other local tourism/cultural businesses/ organisations does that matter? Why the **lack of contact**?

How well do you feel you know what **Rugby borough as a whole has to offer** to visitors?

How do we **build more familiarity**? For managers, front desk staff, etc…

Do you work with **businesses /organisations beyond** the Rugby borough area – with **surrounding districts/ counties** ? If so where/who /what package/offer?

Would you like to see **more networking or partnerships** between businesses/organisations in Rugby borough? What form may this take? e.g. quarterly meetings, email newsletters about the tourism sector, meetings for specific groups such as hotel sales managers/ rural accommodation providers?

Feedback - Highlight the top priorities & key actions to improve this.

Develop a brand and stick with it – even for those who do not benefit directly , they will benefit form additional footfall.

Connect the town with the borough and the 'out of town' with the town – overcome the disconnects

Council or Rugby First - Who is leading on doing more of the whole area marketing – beyond just the town centre?

Business forum – evenings?

Taking responsibility for own business, but working together - Great product, poor service

Set up a Tourism Partnership - run by RBC including a wide range of stakeholders including those with the right range of skills and experiences –not just a talking shop

Define the remit of the Partnership - what's it for, who does what? Key role for marketing of Rugby

Define a vision of the borough's visitor offer – include guidelines to ensure consistency of message

Private sector not directly connected to tourism – to be more involved. Be more active – eg engineering, as connects with business tourism, and part of town's roots and identity

Rugby School- strong user of local companies – know each other better

Chamber of Commerce to be more involved

Rugby Borough Council to shout more loudly about the destination to local businesses – use of social media more

Topic C: Doing things smarter / Joining up the connections

Prompt points/questions:

Are businesses – leaders, staff, volunteers – **well enough skilled, flexible, creative** to improve the visitor experience and grow tourism? How can they **be helped**?

Who else should be talking to each other? – colleges/ Universities/ public transport providers, major businesses placing trade into the hotels/ restaurants /theatres…

What **is currently** being done but **might be done differently** to have more effect?

What tourism-related **actions would really help your business/organisation** to grow?

So -do we need an **overall Rugby Tourism Partnership/ organisation**?

How is it funded/ what would it focus on doing?

Feedback - Highlight the top priorities & key actions to improve this.

Set up a Tourism Association – run it free for 2 years, delivering easy wins to bind people in

- then introduce subs so it self funds
- do some down to earth activities – leaflet swaps, website, forum, links, e-newsletters, etc
- rotate the Chair & rotate the venue – give brief 20 min presentations and site familiarisation tours
- make joint funding bids to deliver projects to join things up
- outward facing social media, and inward website to share info. And feed into others' sites

Workshops on good practice - the importance of good service 'it's not Arkwright anymore!'

- Welcome to Excellence programme courses/ training for front desk and managers – Tourism South East
- 'proper' Awards programme

Involve younger generation to promote Rugby as a destination in their specific field, eg live music, events, etc

Create a database of tourism related businesses/ facilities

Create 'Ambassador' type roles – speak up for the town, borough and products and experiences – build upon good work of the BID with Ambassadors and rangers

Organise training / communication sessions - aimed at satellite locations distant from the town centre – and with 'first contacts' eg taxi drivers, station staff

Work with Shakespeare's England as a route to entry for potential new visitors – join it?

Links with Coventry and NEC

Piggy back on others – Rugby cannot do it alone