Tourism Growth Strategy
Bedfordshire & Luton
2007-2012

CONTENTS

EXECUTIVE SUMMARY

Luton and Bedfordshire are not natural ‘tourism’ destinations and yet, right now, 5% of the workforce owes its living to the visitor economy. The opportunity is there for significant growth that will bring a wide range of benefits as well as supporting jobs. Investment in the development of the visitor economy can support better facilities in rural areas, a wider range of events for locals, improvements in retail and transport, greater civic pride and a reduction in out commuting.

Tourism supports a significant number of jobs in Bedfordshire and Luton. However, the tourism economy in Bedfordshire is not healthy. Over the last 5 years tourism earnings have remained static and the county relies heavily on the day visitor market, which is the market that has the greatest environmental impact and puts pressure on the infrastructure that supports tourism e.g. roads. Business tourism is very important but competition is increasing and lack of on site accommodation is limiting growth. The image of the area on the part of residents and visitors is negative or indifferent and perceptions need to change.

There is work to be done in changing the image and perception of Luton and Bedfordshire. The challenge for the County of Bedfordshire is to make potential visitors aware of what Bedfordshire has to offer in order to turn indifference into positive perceptions of the county. The challenge for Luton and Bedford is to change negative perceptions into positive perceptions. One of the incidental benefits of a focus on developing positive messages for visitors is the fact that this will help residents develop a sense of civic pride, something that is key to the future of any successful and sustainable tourism development in the area. In order for this to be successful, it will be important for any marketing messages generated to support the tourism strategy to be in sympathy with, and supportive of, wider marketing messages being conveyed by the towns and County to businesses and those interested in investment.

The scale of development planned for Bedfordshire and Luton presents an opportunity to transform the image of the area and to significantly increase the size of, and contribution from, the visitor economy. Opportunities have been identified to grow direct tourism employment by 5,000 jobs in the next 15 years. This can be achieved by:

- An immediate focus on turning family day visitors into staying visitors
- Working together to ensure that the area’s proximity to London can be exploited to grow the business tourism market
- Using new tools and techniques, such as a one stop shop website, to make it easier for potential visitors to find out about the area
- Building on the rural assets of Bedfordshire and the growing range of events and activities to attract affluent adults
- Combining the opportunities that flow from London 2012 with new investment in cultural facilities to change the perception of the area
- Developing a greater sense of civic pride by working with existing and new residents through initiatives such as Hidden Britain to help people appreciate what they have on their doorstep
- Creating a new partnership of the public and private sector to work together on development and promotion

The Tourism Growth Strategy sets out a vision for the future as follows,

> ***'Luton and Bedfordshire will be recognised as places that have changed for the better. They will be known for their professionalism in hosting business visitors and in exploiting their location. Visitors will enjoy the variety of town and country, outstanding attractions and events and their increased spending will support good quality local employment.'***

It proposes a staged approach to development and promotion so that benefits can be realised immediately while new products are coming on stream. The strategy analyses the major opportunities and makes specific recommendations for action. The 24 recommendations are summarised in an Action Plan and actions have been prioritised. The Action Plan will be a 'live' document that is reviewed and amended as joint projects are agreed with partners.

The Strategy proposes a monitoring system with the overall direction kept under review by a newly appointed Strategic Tourism Advisory Group. They will be supported by a steering group that will look after detailed actions and informed by a Tourism Forum of all stakeholders that is expected to meet at least twice a year.

Visitors are increasingly aware of the environmental cost of overseas travel and are looking for ideas and suggestions on how to holiday more responsibly. The range of opportunities that Luton and Bedfordshire can offer to these visitors is significant and growing. By working together the public and private sector can genuinely create a virtuous circle that brings more local employment, better facilities for residents and satisfied visitors.

1. INTRODUCTION

The East of England region covers the counties of Bedfordshire, Hertfordshire, Cambridgeshire, Norfolk, Suffolk and Essex. Responsibility for economic growth and development within the region is the remit of the East of England Development Agency (EEDA) in cooperation with Local Authorities and national government. EEDA publishes a Regional Economic Strategy (RES) that sets out the aspirations for the region and details targets for the region as a whole.

EEDA has recognised that the broad objectives established for the region need to be turned into detailed plans and that these will only be implemented successfully by local people. To help this happen, EEDA established nine sub regional partnerships. The sub regional partnership for Bedfordshire is the Bedfordshire and Luton Economic Development Partnership (BLEDP). BLEDP has carried out an audit of the area and published an economic strategy, 'Building a Sustainable Economy' in June 2005.

This document reviews many of the issues facing the area and in particular it notes:

The area is identified in the Sustainable Communities Plan as being where new housing is to be located and an estimated 56,500 new homes will be built by 2021.
Out commuting is leading to some towns in the area becoming dormitory towns and this trend is predicted to continue. Business growth and productivity is not keeping pace with national averages.

The conclusion is that the area needs to generate significant numbers of new jobs. The target set is to grow jobs by 50,000 (over and above normal rates) by 2021. This is a very challenging target that will only be realised if the area can identify opportunities that have not been exploited to date. One of the industry sectors that is already important is the tourism sector and it was agreed that it should be reviewed to identify what could be done to grow the contribution it can make to the economy.

The purpose of this strategy document is to summarise the conclusions of this review, to explain some of the background and to put forward solutions.

Process

A Steering Group made up of public and private sector representatives has managed the strategy development process. Existing data has been analysed and original research was commissioned to ensure that proposals were practical and realistic Consultation took place over a 9-month period and involved a wide range of participants. The process included three consultation events and circulation of a draft strategy that attracted many written responses. The development of the Action Plan was also informed by these contributions.

2. ANALYSIS OF CURRENT PERFORMANCE

Research Data

If the visitor economy of Bedfordshire is to grow, it is important that we understand how tourism has performed in the past and what issues have contributed to this performance. The first stage of analysis has been to look at all available data on tourism: the main sources are the International Passenger Survey, the UK Tourism Survey, the UK Day Visits Survey and the annual Occupancy Survey. As a general word of caution about this section, the data specific to Bedfordshire is often based on relatively small samples and should be treated as indicative rather than definitive. Some of it is also dependent on the robustness of the national surveys and during the period 2003-2004, there have been concerns about the accuracy of the national data (particularly UKTS).[1]

This analysis shows that tourism is already a very important sector of the economy of Bedfordshire and Luton contributing £465m per annum (**Table 1**). However, there are some clearly identified issues about the health of the visitor economy. In particular these are the lack of relative growth in visitor spending, the drop in occupancy levels in serviced accommodation, and the over reliance on the day visitor market.

Volume and Value Summary							
Year	**Total Value**	**Volume Stay**	**Volume Day**	**Value Stay**	**Spend per trip**	**Value Day**	**Spend per day**
2002	**£439.8m**	**1.17m**	**9.1m**	**£183m**	**£156**	**£256m**	**£28**
2003	**£441m**	**1.22m**	**9.6m**	**£171m**	**£140**	**£269m**	**£28**
2004	**£465.6m**	**1.26m**	**9.9m**	**£188m**	**£149**	**£277m**	**£28**
Source: EETB Economic Impact of Tourism in Bedfordshire							

Table 1: Volume and Value Summary

Economic Impact

Direct expenditure by tourists in Bedfordshire is estimated to be £465m (2004 data), and in real terms has shown no growth in recent years. This expenditure is estimated to directly support over 6,600 jobs (FTE) with a further 3,000 supported indirectly. The number of jobs supported directly is estimated to be 4.7% of all jobs in Bedfordshire.

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Trends

While there has been some growth in the number of visitors to the area, now attracting 11.2m visitors a year, the average expenditure by these visitors has been declining in real terms.

Types of Visitors

The vast majority of visitors to Bedfordshire come on day visits. Almost 90% of visitors do not stay overnight and they account for 60% of the expenditure (compared with a national average of 43%). Average spend by day visitors is £28 per visit. Of the staying visitors, most come from elsewhere within the UK and they contribute a further 25% of tourist expenditure. International visitors make up less than 2% of the total in numbers terms, but 15% of spend. (**Table 2**)

Table 2: Economic Impact. Source EETB Economic Impact 2004

Purpose of Visit

Among both UK and International staying visitors, the purpose of their visit to Bedfordshire is much more likely to be to visit friends or relatives than is found among visitors either to the rest of the East of England or to the rest of the country. It is much less likely to be for a holiday. Overseas visitors are also less likely to be coming on business trips, whereas the proportion of domestic visitors on business is similar to England as a whole, and stronger than for the East of England region. (**Table 3**)

In terms of expenditure, business trips account for 30% of domestic staying visitor spending, almost as much as holidays, whereas typically in other regions, holiday expenditure is almost double that of business.

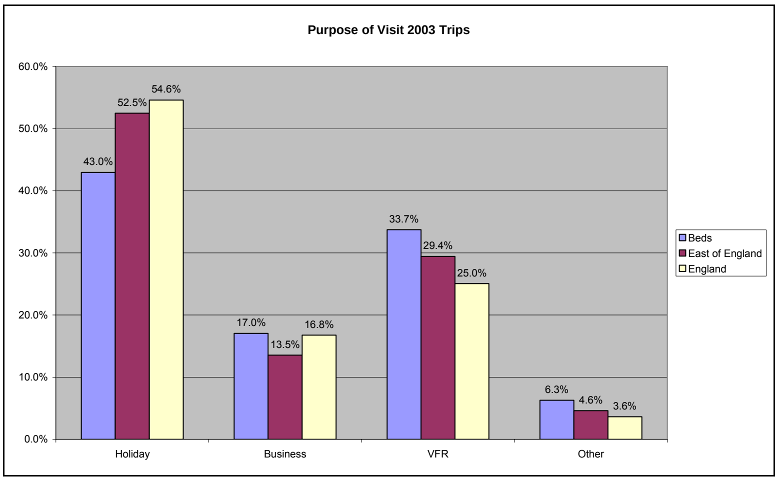

Table 3: Purpose of visit. Source EETB/UKTS 2003

Length of Stay

When people do stay in Bedfordshire, they tend to stay for a shorter period of time than is the case for either the East of England or England as a whole. Average length of stay on all visits is 3.7 nights compared to 3.9 for the other regions. This is true of both UK visitors (3.0 compared to 3.2 for East of England) and more obviously overseas visitors (7.6 v 8.5). It is also true for all purposes of visit, whether holiday, business or visiting friends or relatives.

Spend per Night

Not only is the number of nights per staying visitor lower, but spend for each night they do stay is lower than for other regions as well. On average for 2003 (the last year when robust comparisons can be made), staying visitors spent just over £38 per night compared to nearly £43 for the East of England and £56 for England as a whole. (**Table 4**)

This is mainly driven by the UK staying visitor, where the corresponding spends were £36, £44, and £55; overseas visitors spending per night was higher in Bedfordshire than for East of England (£45 v £40), but was still lower than for England in total (£58) which will be influenced by the high proportion who stay in London.

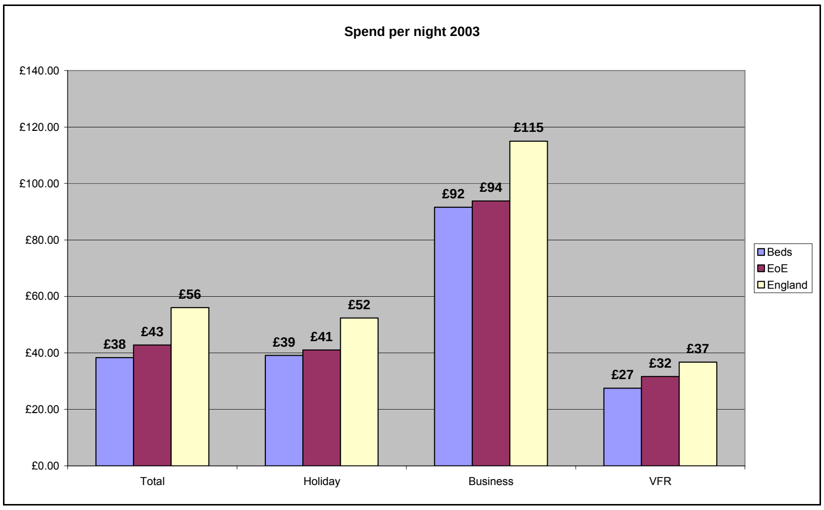

Table 4: Spend per Night. Source: EETB Economic Impact Report

Occupancy

Overall room occupancy for Bedfordshire has been consistently lower than for the East of England over the last few years. Bedfordshire occupancy has fallen from 56% in 2002 to 49% in 2005, while rates for the wider region have remained around 59% during that time.

The dependence on business visitors noted earlier is reflected in the occupancy data, which show that business visitors account for nearly 60% of guests in serviced accommodation compared to around 33% for the East of England overall. Furthermore, weekday occupancy in Bedfordshire is similar to the East of England as a whole, but weekend occupancy is much lower. However, the last few years have witnessed a gradual fall in the level of weekday occupancy.

Seasonality

The main difference in occupancy rates between Bedfordshire and the East of England is a result of the county having lower rates in the peak summer months of July to September and again in December. However, in the last few years there has been an improvement in summer occupancy, while there have been falls in the winter period. Whereas Bedfordshire used to enjoy higher occupancy rates than the East of England in the January- April period, it is now at best at the same level. (**Table 5**)

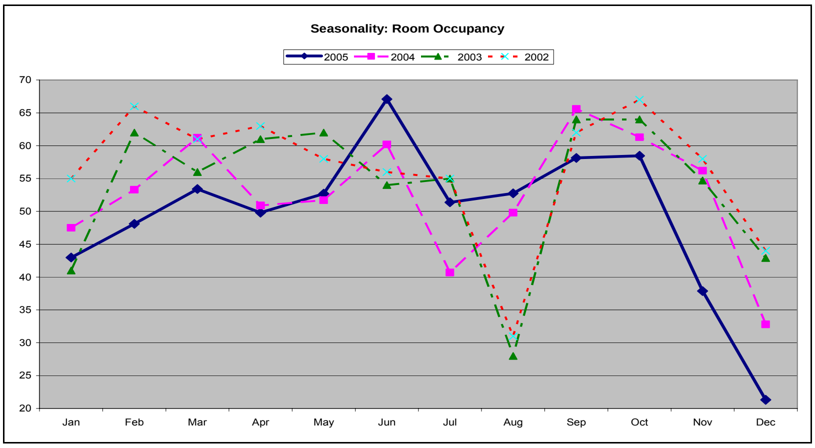

Table 5: Room Occupancy. Source EETB Occupancy Survey

Visitor Attractions

	Visitor Numbers 2002	Visitor Numbers 2003
Over 100,000 visitors p.a.		
Whipsnade Wild Animal Park, Dunstable	456,896	470,934
Woburn Safari Park, Woburn	415,787	415,787
Dunstable Downs Country Park, Kensworth	450,000	400,000
Woburn Abbey		350,000
Priory Country Park, Bedford	210,000	200,000
Marston Vale Forest Centre		150,000
Shuttleworth Collection	75,000	110,253
Over 50,000 visitors p.a.		
Danish Camp Visitor Centre	90,000	90,000
Stockwood Craft Museum & Garden, Luton	74,587	74,587
Luton Museum, Luton	54,348	54,348
Over 5,000 visitors p.a.		
RSPB Sandy	43,954	43,954
Wrest Park Gardens, Silsoe	44,730	43,325
Bedford Butterfly Park, Wilden	26,845	29,040
English School of Falconry, Biggleswade	15,000	26,000
Stondon Museum, Henlow Camp	25,000	25,000
Bedford Museum, Bedford	26,211	23,597
Cecil Higgins Art Gallery, Bedford	22,800	22,070
Leighton Buzzard Railway, Leighton Buzzard	19,803	21,042
Sundon Hills Country Park	15,000	20,000
Swiss Garden, Old Warden Park	18,000	19,000
Glenn Miller Museum	2,000	15,532
Bromham Mill	8,120	7,360
John Dony Field Centre, Luton	7,148	7,148
Woburn Heritage Centre	7,000	6,500
John Bunyan Museum, Bedford	5,425	5,018
Gallery, Bedford Makers & Designers	5,000	5,000

Table 6: Major visitor attractions in the region

The area has some very well known and successful visitor attractions and a reasonable range of mid size and small attractions as shown at **Table 6**. The wildlife attractions currently act as flagships for the area and play a very important role in attracting visitors. The challenge is to broaden the appeal to visitors so that the overall offering is more diverse.

Image

The image of a destination has an enormous impact on the decision of a visitor to visit, but also on their experience while they are in the destination. There are two important effects of a good image. Firstly, the decision to make a short visit or spend a holiday is often made on the basis of perceptions or recommendations, as the individual making the purchase will not have been to the place before and cannot touch and feel the product before buying it. The second impact is the impact that image has on the residents of the destination. A strong self-image and pride in the place in which you live translates into an understanding of why visitors want to visit. Pride in the local area also enhances the experience of the visitor, as residents are keen to talk about and show off what the area has to offer.

Useful data on residents' perceptions of the area has been provided by a survey conducted by MORI for EEDA. This survey looked at the perceptions of residents in the East of England and their attitude towards towns and counties within the region. This survey was conducted in 2000 and 2003 and therefore any changes over time can be tracked. Table 7 shows a summary of residents' perceptions. It can be seen from this that Bedfordshire does not have a particularly positive image amongst residents of the East of England. Also of concern is the fact that Luton and, to a lesser extent, Bedford were highlighted as particular weaknesses of the region. This poor perception is a significant consideration in looking at the way the area can be presented and branded. An ambitious tourism growth strategy can have a significant impact on the self-image of an area and therefore may contribute to changing these poor perceptions.

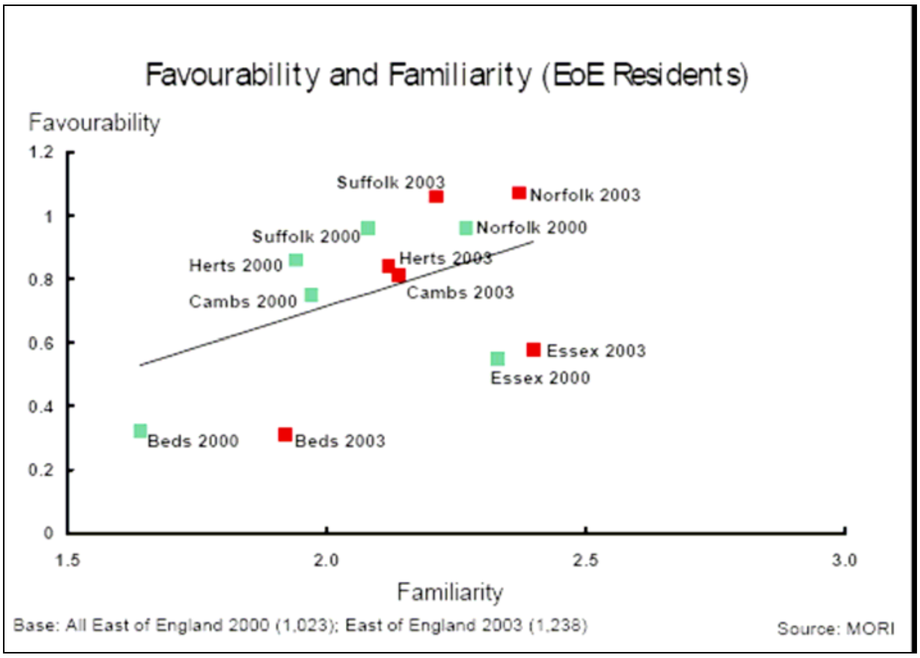

Table 7: Perceptions of Counties by East of England Residents

The consultants also looked for data on perceptions of visitors to the area, but no surveys had been conducted that we could identify, and therefore additional research was commissioned. One part of this research involved conducting an Omnibus survey amongst potential visitors to see what their perceptions and expectations were. This survey generated similar results for Bedford and Luton as the MORI survey, in that the general perception of Luton was poor and the expectations of Bedford were limited, although not so negative. In the case of the County of Bedfordshire the survey revealed a general indifference towards the county and a lack of knowledge.

These two surveys show that there is work to be done in changing the image and perception of Luton and Bedfordshire. The challenge for the County of Bedfordshire is to make potential visitors aware of what Bedfordshire has to offer in order to turn the indifference into positive perceptions of the county. The challenge for Luton and Bedford is to change negative perceptions into positive perceptions. In order for this to be successful, it will be important for any marketing messages generated to support the tourism strategy to be in sympathy with, and supportive of, wider marketing messages being conveyed by the towns and County to businesses and those interested in investment.

Tourism Product

Audit of Existing Product

In addition to the analysis of visitor patterns the consultants looked at available information on product in the area. The information on the provision for business visitors was drawn from the EEDA commissioned Business Tourism Review. Accommodation and attractions data was sourced from the East of England Tourist Board.

Visitor Attractions

The area is fortunate in having some world leading visitor attractions in Woburn and Whipsnade that appeal particularly to the family market. It also has a number of very strong specialist attractions and a range of interesting attractions in neighbouring areas. There is very little 'packaging' of these attractions at present so that the visitor has to work quite hard to make the most of what is there. In addition, the economies of scale of visitor attractions mean that marketing budgets are rarely significant in attractions that have less than 100,000 visitors. Providing support for attractions to work together would be a good use of resources. Growth could come from the development of a major iconic attraction, such as NIRAH, from providing opportunities for attractions to 'bundle' their offering and share the marketing costs involved and from linking cultural developments more closely with visitor information so that an 'event' can be part of a visit. There is an opportunity to pursue all of these avenues in Bedfordshire and Luton.

Activity Breaks

There is an opportunity to develop a 'green' offering based around the rural aspects of Bedfordshire and to increase the short break market based on activities. One of the surprising features of the area is the range of 'Red Letter Day' type experiences that can be enjoyed in a small geographical area. This can be developed via the web and will contribute to changing perceptions of the area.

Cultural Breaks

The offering for adults without children based around culture and events is not strong at the moment although many of the planned developments mentioned in the next section will add to the range of things to see and do. Developments in Luton and Bedford – such as the cultural quarter and the National Centre for Carnival Arts will bring a new set of reasons to visit. These have significant potential and should be developed over the next two years with a view to launching promotions in the medium term.

Business Tourism

In terms of business tourism this audit highlighted a shortage of on site accommodation for meetings and conferences. A total of 58 properties can offer meeting space with a total meeting room capacity of 38,000 but the number of bedrooms is less than 3,000. Only 60% of the properties with meeting space can offer on site accommodation. This means that the opportunity to bid for residential conferences is constrained. Discussions with hoteliers highlighted the fact that hotels are often full on the midweek nights of Tuesday/Wednesday, but struggle to fill rooms on other nights of the week. This uneven occupancy picture makes hotel development less attractive to potential investors. There is a need to develop better yield management so that attractive rates can be offered to business bookers to even out demand.

Accommodation

The audit of accommodation highlighted the fact that the provision is very heavily dependent on budget and lodge style accommodation with almost 50% of rooms in this category. A couple of 4 star hotels exist and there are no 5 star hotels. Several new hotels are planned but there is potential for more development especially in or near Luton and at the 4 star level.

There is also almost no provision for self-catering or on campsites. The possible development of Center Parcs would bring significant self-catering capacity to the area. However, this development is not certain and in the meantime it would be helpful for local plans to facilitate the development of more self-catering and camp style accommodation. The absence of this style of accommodation will limit the development of the leisure market.

Quality

The picture on the quality of what is on offer is very mixed. In Cranfield and Wyboston Lakes, the area has two outstanding examples of best practice in the conference and meetings sector. In attractions, the area has some of the best in the UK and in accommodation a few top rated b&b's. However, the general picture is of average quality and no real sense that those in business are aware of innovation in the UK or overseas. The strategy needs to have a dual focus on improving quality in tandem with marketing initiatives. This is particularly true in relation to the development of the business tourism market as this is a competitive marketplace.

Analysis of Current Performance: Summary

In summary this analysis has shown that the area has strengths in visitor attractions which support the day visitor market and has benefited from business tourism but it is not attracting enough people to stay overnight and when visitors do stay they do not stay as long or spend as much as the national average. The strategy needs to be sufficiently ambitious to turn this situation around.

Tourism supports a significant number of jobs in Bedfordshire and Luton. However, the tourism economy in Bedfordshire is not healthy. Over the last 5 years tourism earnings have remained static and the county relies heavily on the day visitor market, which is the market that has the greatest environmental impact and puts pressure on the infrastructure that supports tourism e.g. roads. Business tourism is very important but competition is increasing and lack of on site accommodation is limiting growth. The image of the area on the part of residents and visitors is negative or indifferent and perceptions need to change.

3. THE OPPORTUNITY

Luton and Bedfordshire are not natural 'tourism' destinations and yet, right now, 5% of the workforce owes its living to the visitor economy. The opportunity is there for significant growth that will bring a wide range of benefits as well as supporting jobs. Investment in the development of the visitor economy can support better facilities in rural areas, a wider range of events for locals, improvements in retail and transport, greater civic pride and a reduction in out commuting.

The timing of the strategy is important. It is being produced as a result of partnership working and can build on a spirit of local cooperation that will be essential to achieving success. It coincides with major new developments that open up opportunities to widen the range of what is on offer and improve the quality of experience. Finally, it is being developed with a long-term vision but with a once in a lifetime opportunity to capitalise on London hosting the Olympic Games in 2012. Few areas outside the capital are as well placed to reap the benefits of the Olympics and the next five years should be used to ensure that this opportunity is maximised.

Investment in New Product

Bedfordshire and Luton is an area where major change is planned. Huge investments are in the pipeline, which will result in a transformation of the area. It is therefore important that the tourism strategy looks to the future and sees the potential for development that can be built on the back of this new investment.

In line with the Joint Economic Development Strategy, the tourism strategy is looking forward 15 years to 2021 and needs to take account of developments that are planned during this period to see how they will add to and enhance the current tourism offer. As a first step, the consultants collated information on all known and planned developments, including information about the timescale of these developments and their job creation potential and then looked at each one in terms of its best fit into a product portfolio. This exercise highlighted the very significant level of investment that is already underway, and the spending that is planned. Major transport infrastructure development has also been noted as it opens up opportunities. **Appendix 8** sets out a summary of these developments. In particular it is worth highlighting the following:

Center Parcs and NIRAH

These developments are the most well known and both projects will have a major impact in the area if they come to fruition. Together they account for over 2,000 new jobs and they provide both a reason for a visit and an increase in the type of accommodation stock that will support staying visits. These developments are very important but their future is unknown. The steering group took the view that the tourism growth strategy should not stand or fall on the success of these two projects. The strategy seeks to maximise every opportunity so that tourism can grow. With these projects it will grow faster, but it needs to be sufficiently robust to grow even if these iconic projects do not happen.

Cultural Developments

In 2008 the National Centre for Carnival Arts (NCCA) will open in Luton. This is an exciting development as it will create a centre of excellence in carnival arts and develop skills in costume making, dance, drum workshops, choreography, stewarding etc. It will have a performance space and steel pan orchestra and supply talent to carnivals in the UK and overseas. In Bedford a new cultural quarter is being developed, Dunstable is getting a new theatre and several museums are being upgraded including the Cecil Higgins Art Gallery, Bedford Creative Arts Gallery and the Stockwood Craft Museum. As these developments reach fruition they will provide a critical mass of attractions that will allow for the development and promotion of event related short breaks. This is seen as a promotions opportunity for the medium term and will sit well alongside preparations for the Olympics.

Green Infrastructure

Several projects in the pipeline such as the new Gateway Visitor Centre on Dunstable Downs offer the potential to build on the rural elements of Bedfordshire and offer an attractive ‘green’ experience close to urban centres. Linking the geography of the Chilterns, the Greensand Ridge/Dunstable Downs with walks/ trails and the Taste of Bedfordshire will combine well with new events to represent an attractive package for couples or groups of adults without children. As the network of Hidden Britain locations develop, these can link together to complement the experience.

Hotel and Conference Facilities

2007 will see the arrival of the first 5 star hotel in the area when the Luton Hoo Hotel opens in October. Several other new hotels are due to open over the next few years as well as the arrival of new conference facilities at the old Vauxhall site – now called Napier Park. The English Heritage attraction at Wrest Park is looking at significant investment and redevelopment of existing properties is planned.

Other Developments

A planning application to build a Casino will be decided in 2007, approval has been given for the development of a Rowing Lake in Bedford, a lottery application to develop the first part of the Bedford to Milton Keynes Waterway has been successful, Woburn has plans to reinvest £12m and to develop the Woburn Estate as a ‘green’ destination and Bromham Mill has plans to invest £6m. In addition, several transport projects will make the area more accessible.

This analysis shows that these developments will address some of the issues identified in section 2. The addition of several new hotels will help to modernise the offer for the conference and meetings market and will add to the range of properties that can offer onsite accommodation, as well as meeting rooms. The planned development of Center Parcs will address the very significant need for more self-catering accommodation, and the addition of the National Centre for Carnival Arts, plus a range of new theatres and cultural quarters will significantly add to the range of events and things to do in the area.

Our view is that the scale of planned change is not widely known or understood in the area and that there is a job to be done to communicate to residents and businesses more about the exciting opportunities opened up by this investment.

Jobs Growth

Tourism directly supports almost 7,000 jobs in the area, but it has the potential to do more. Our view is that there is the potential to generate a further 5,000 jobs through a combination of investment in new product and professional marketing and promotion. This is a considerable increase and will require focussed activity but it is achievable.

The consultants looked at jobs growth in two ways. The first exercise looked at the estimates made by developers of the job creation potential arising from their planned investments. A conservative view was adopted and these figures were adjusted to take account of the fact that not all planned development would proceed. In addition, all jobs generated as a result of the expansion of Luton airport were excluded to avoid double counting. This process identified an additional c4,000 jobs directly related to development. The impact of professional marketing and promotion of the area added a further 1,000 jobs to give an increase of 5,000.

The second method was to model growth in visitor expenditure using assumptions about the impact of the Olympics and the effect of a greater focus by Bedfordshire and Luton on higher spending markets. This modelling produced a range of job growth figures. These can be summarised as a) Do nothing b) Proactive c) Optimistic. **Table 9** below summarises these assumptions and their impact.

Assumption	Total Direct Jobs by 2021	Net Gain by 2021
Do nothing. (Increases mirror expenditure growth achieved in the last three years)	9330	2670
Proactive (Growth in all areas and higher than average in target areas e.g. Business tourism. Olympic effect over 5 years)	12,092	5,432
Optimistic (Growth in all areas as above. Olympic effect over 10 years as per Grant Thornton estimates)	12,345	5,685

Table 8: Job Growth

SWOT Analysis

In addition to the research and analysis conducted by the consultants, a workshop was held amongst tourism operators in the area to review the current offering and make suggestions for change. This workshop produced a SWOT analysis (Strengths/Weaknesses/ Opportunities/Threats). The full chart is included in the **Appendix 1**.

This exercise clearly identifies the fact that there are many opportunities that can be developed. The strategy needs to ensure that benefits can be realised throughout the 15-year period and that some 'quick wins' can be achieved while major investment is coming on stream.

Product Segments Suitable for Development

The consultants reviewed both new investments and previous performance to identify the current and future product range and to see how these products could be grouped into product segments that would lend themselves to a stronger product offer to customers. This analysis highlighted that there were five significant areas of opportunity as follows:

- The business tourism market, particularly the conference and meetings sector.
- The family short breaks market.
- The visiting friends and relatives market.
- The adult short breaks market.
- Opportunities arising from London 2012.

The development of these product segments will need to be phased, as not all the elements will be in place immediately. The recommendation is to package and promote existing product in the short term (years 1-5) while development and construction is under way. In the medium term (years 6-10) new product segments can be brought on stream and this will diversify the customer base and refresh the offer to visitors. The Marketing Strategy looks in detail at each of these segments and recommends action to develop each opportunity.

The Opportunity: Summary

The scale of development planned for Bedfordshire and Luton presents an opportunity to transform the image of the area and to significantly increase the size of, and contribution from, the visitor economy. Few areas of the UK are as well placed to benefit from London 2012 and an integrated programme of product development and promotion will allow the area to capitalise on this opportunity and generate an additional 5000 jobs.

4. DEVELOPING A VISION

Strategic Context

Several bodies have a remit to foster the economic development of the area. The East of England Development Agency publishes a Regional Economic Strategy 'A Shared Vision' that sets out the priorities for the region and explains how they link in to the national agenda. This document was last updated in 2004 and its vision is to produce

'A leading economy, founded on our world class knowledge base and the creativity and enterprise of our people, in order to improve the quality of life for all who live and work here'

EEDA works with 9 sub regional economic partnerships (SREPS) to translate this vision into more detailed plans and targets. The SREP for this area is the Bedfordshire and Luton Economic Development Partnership. BLEDP has published a joint economic development strategy for the area, 'Building a Sustainable Economy' and this adopts the same vision as that set out at regional level.

At national level the government has published a document 'Sustainable Communities' that sets out long-term targets for new housing and supporting infrastructure. This identifies 2 areas (Luton/Dunstable/Houghton Regis and Bedford/Kempston) where there will be very large scale new housing. Two organisations (known as Local Delivery Vehicles) are being established to support this development. One of these, Renaissance Bedford is in existence and the second will be established by early 2007.

Bedfordshire County Council is a key player in all these partnerships as well as having responsibility for delivering services to local people and managing the environment. It describes its role as 'Making Bedfordshire thrive' and places particular emphasis on valuing and protecting the rural and countryside aspects of Bedfordshire.

Luton is the largest town in the area with a population of 185,000 people. It is going through significant change as the impact of the closure of Vauxhall leads to the development of a different economic base. Luton has developed a Master Plan for the town and recognises the need for large-scale redevelopment. It describes itself as a 'changing place' and does not anticipate being in a position to offer a high quality visitor experience for the next 5 years. It aims to build its strength as a shopping and cultural centre and to maximise the opportunity presented by the opening of the National Centre for Carnival Arts. In the short term the focus will be on the development of the business tourism market and events.

Bedford has also developed a Master Plan for the town and is working with consultants to develop a new vision. At present Bedford describes itself as 'Central for Business' with an emphasis on its good transport connections. Bedford has identified some key product development areas in its outline tourism strategy, such as attractions that feature World War II.

Proposed Vision

One of the challenges in developing a clear vision for tourism in Luton and Bedfordshire is that they are very different places, at different stages of economic development and with different aspirations. The messages conveyed to visitors must echo the image that places have of themselves. The consultants therefore looked at what a broad vision statement might look like if it related to each place. Our understanding to date suggests that a vision for Bedfordshire might be:

'The county of Bedfordshire will be known for its excellent quality of life, combining the best of town and country with London on the doorstep. It will have a growing population offering a skilled workforce to local employers supported by the knowledge base of its Universities. Residents will be proud of where they live and will enjoy sharing its benefits with visitors.'

The suggested vision for Luton might be:

> *'Luton will be recognised as a business hub, proud of its roots in manufacturing and enjoying its place as a centre of excellence in new industries. Luton will celebrate the energy generated by its diverse young population and will have an international reputation for events led by its Carnival.'*

If our interpretation of the aspirations for Luton and Bedfordshire is appropriate then this would lead us to suggest a vision for the tourism strategy as follows:

'Luton and Bedfordshire will be recognised as places that have changed for the better. They will be known for their professionalism in hosting business visitors and in exploiting their location. Visitors will enjoy the variety of town and country, outstanding attractions and events and their increased spending will support good quality local employment.'

Development of Objectives

The primary driver for the development of a Tourism Growth Strategy has been the recognition that this sector has the potential to generate local jobs. The strategy also needs to address related priorities and in particular to ensure that growth can be achieved in a sustainable way.

Sustainability

Sustainable tourism means that development works for visitors, the industry, the community and the environment. The strategy needs to deliver that by building on existing strengths, maximising the opportunities arising from planned investment, identifying opportunities for existing businesses to work together more effectively, supporting development that is in sympathy with the local environment and directing visitors to use public transport where possible.

The primary objective of the strategy should be to address the low level of expenditure that is currently generated in relation to the number of visitors. A focus on the value generated will reduce the environmental footprint of more visitors. This should be achieved by seeking to convert day visitors to overnight visitors, by seeking to improve earnings from business tourism and by broadening the offering to attract more short breaks that are not family dependent.

The area is fortunate in having excellent transport connections to the two major towns. These can be exploited through the development of city based visits and business tourism. The development of facilities within easy reach of Luton airport will also maximise the opportunities to use public transport. Good public transport also opens up opportunities for local people to benefit from the new jobs that are created.

Rural Development

Bedfordshire is predominantly a rural county that offers the opportunity to participate in activities such as walking/cycling etc. The development of this offering and its promotion has the dual benefit of sustaining businesses in the countryside and encouraging visitors to be more active. The existence of countryside, country parks and the river can be developed into a ‘green’ offering that will attract a wider base of visitors.

Quality and Skills

The product audit commented on some development issues in terms of physical facilities. It is equally important to ensure that appropriately trained and motivated people are employed in tourism businesses, as good customer service is an essential part of the quality of the experience. In 2004 a Skills Audit was commissioned for the tourism and hospitality sector in Bedfordshire and this sets out the priority needs for the future. An extract from this report is included in the **Appendix 2.** A programme of training and development to meet these needs will be discussed with the Learning and Skills Council and the Sector Skills Council, People 1st.

Regional Strategic Tourism Priorities

The strategy should integrate with and support the strategic direction of the region as described by EEDA. In 2005 the EEDA Board debated the importance of the visitor economy and set out the regional strategic priorities for tourism. **Table 10** below summarises these priorities. A matching set of objectives for the area is proposed that can sit alongside the regional agenda.

	Regional Objective	Area Objective
Strategic Marketing	To initiate/co-ordinate a limited number of marketing / (marketing support) activities which add value to, or facilitate action by, other stakeholders or where region-wide action is the most effective route forward.	To develop a marketing strategy that will increase the value of tourism to the economies of Beds and Luton and will broaden the visitor base.
Business Support and Skills	To raise aspirations, professionalism, and competitiveness of tourism enterprises and career prospects in the tourism sector.	Agree a programme of skills training and development for the area with People 1st and LSC. Develop a tourism version of the 'On Your Marks' programme in preparation for London 2012
Product Innovation	To stimulate new projects, innovative practices and attract development and investment in order to ensure that the tourism sector is renewing itself, adapting to change and able to offer a tourism experience and facilities which position the region as a leading edge destination.	Work with the private sector to develop innovative new product in particular self-catering, residential meeting facilities, events and 'green' tourism.
Destination Renaissance	To facilitate the revitalisation of towns, cities, countryside and coast to provide a distinctive and high quality environment, benefiting both residents and underpinning the region's tourism offer.	Support the regeneration of Luton and Bedford and advise on how best to maximise development in the interests of attracting visitors.
Intelligence and Expertise	To establish systems which can measure the impact of tourism and provide the industry with the information and intelligence it needs in order to improve its performance and raise productivity.	Develop a compendium of base data for the area and monitor performance. Conduct regular visitor satisfaction and visitor perception surveys to monitor progress.
Capacity Building	To establish and support a tourism network across the region which can deliver the wider tourism agenda locally (and sub regionally) and engage with the tourism industry. To provide a voice for the industry to influence other agencies	Establish a tourism partnership in cooperation with Local Authorities in the area. Use the partnership as a mechanism for disseminating information and best practice to businesses in the area.

Table 9: Regional & Sub Regional Priorities

Timetable

Finally, the timing of achieving change needs to be clear. It is important that the strategy can bring about improvements in the short term and respond to new product as it comes on stream. The overall strategy will be delivered over 15 years but a clear plan for the short and medium term is needed.

The marketing strategy explores the specific actions needed to develop the opportunities identified. Some development work will be needed to create the product offering for some customers. The plan envisages development work taking place throughout the life of the strategy with product brought to market when it is fully developed. This will allow the customer base to be broadened over time and marketing campaigns to be continually refreshed. It is proposed that the priorities should change and develop as follows (**Table 11**).

Short Term 2007-2011	Medium Term 2012- 2016	Long Term 2017 -2021
Convert day visits to overnight visits by growing the short break family market	Exploit the expanding cultural offering to attract event related short breaks	Build on the emerging East/West product (Bedford to Milton Keynes Waterway, Bedford River Valley Park) to grow activity breaks
Increase spend from business visitors by providing better information and investment in quality improvement	Promote the high quality 'green' offering of mid and north Bedfordshire to adult short break takers	Exploit sporting expertise and facilities as a follow up to London 2012
Develop and promote a consistent and positive message about Bedfordshire and Luton	Develop a destination brand for Luton that recognises its transformation and start to build a new identity	Use improved cross London and cross channel connections to counteract the effects of congestion on visitors
Invest in skills and product development in preparation for London 2012	Use London 2012 as a focus for growing international business tourism	

Table 10: Marketing Strategy Priorities

Developing a Vision: Summary

The proposed vision for the area is,

'Luton and Bedfordshire will be recognised as places that have changed for the better. They will be known for their professionalism in hosting business visitors and in exploiting their location. Visitors will enjoy the variety of town and country, outstanding attractions and events and their increased spending will support good quality local employment.'

This will be supported by objectives that mirror the strategic direction of the region.

5. MARKETING STRATEGY

The marketing strategy has been developed with the aim of delivering real and sustained growth in the visitor economy, combined with a change in the perception of the area on the part of residents and visitors. These are ambitious targets and will only be achieved if the strategy is adopted wholeheartedly by businesses and public sector bodies and followed through with enthusiasm and determination.

This section sets out the priorities, provides detail on some of the opportunities that can be developed and looks at the brand and communication issues that will support the development of these opportunities.

Marketing Priorities

The marketing objective described above is:

To develop a marketing strategy that will increase the value of tourism to the economies of Bedfordshire and Luton and will broaden the visitor base.

With this as a guide it is proposed that the marketing priorities **for the first 5 years are:**

1. To grow the business tourism market primarily by focusing on the conference and meetings sector, but also by working with inward investment agencies to ensure that opportunities for development of the international business tourism market are exploited.

2. To grow the short break family market, with a particular focus on families with children up to the age of 12.

3. To build on the strength of the visiting friends and relatives market by developing initiatives for residents and target the student population as an unexploited asset.

4. To invest in a programme in preparation for London 2012 that will maximise the opportunities for Luton and Bedfordshire with a focus on visiting journalists, international business visitors and domestic families.

Product Development Priorities

The product analysis has highlighted that there are some specific issues that need to be addressed to support marketing activity. These are as follows:

1. To develop a single point of contact for conference and meetings organisers to maximise the opportunity from any enquiry. To ensure that support material is designed for the needs of the conference organiser and can be distributed electronically, as well as in print. To encourage all venues that offer meeting facilities to benchmark their offering and performance against the best commercial operators in the UK.

2. To publicise and encourage hotels in Luton and Bedfordshire to sign up for the new Visit Britain family friendly accreditation scheme. To carry out an audit of the hotel offering and identify those hotels that are interested in the family market, and work with them to improve their product in the short-term. To make public bodies and planners aware of the needs of the family market and to encourage an increase in self-catering provision in Bedfordshire, including the provision of low cost accommodation such as lodges and campsites.

3. To establish a system for working with the cultural sector in the area to ensure that new events and products can be brought to the attention of visitors as soon as they come on stream. To identify an events programme that will be of interest to both residents and visitors in the lead up to London 2012.

4. To establish a visitor focused web presence, with material that is designed to appeal to the identified segments.

5. To audit transport gateways in advance of London 2012 and recommend changes to improve information and welcome.

6. To work with partners to develop a wider range of short break offers including a ‘green’ offering and event/culture based breaks in Luton and Bedford.

These objectives and priorities have been translated to specific actions that are described more fully in the Action Plan.

Opportunities

Section 3 summarised the product segments that provided the best opportunities. These were:

- The business tourism market, particularly the conference and meetings sector.
- The family short breaks market.
- The visiting friends and relatives market.
- The adult short breaks market, based on events/activities.
- Opportunities arising from London 2012.

A summary of each segment and recommendations for action is set out below.

Business Tourism

'Discretionary business tourism' is the term used for the conference, convention and exhibition business for which there is competition amongst destinations. The briefer term, 'Business tourism' is often used although this does include straightforward corporate travel.

Business tourism is crucial to Britain. The Business Tourism Partnership values business tourism at £15bn annually, of which £4bn is inbound and £11bn is domestic. Within this sector by far the largest share is accounted for by the conference and meetings sector, which is estimated to be worth £12bn.

Business tourism already accounts for 30% of all tourism earnings in Bedfordshire and was worth £139m in 2004. 6 out of 10 people who currently stay in hotels in Bedfordshire are on business. Bedfordshire and Luton are geographically well placed to capitalise on the high yield, year round, discretionary business tourism generated by the conference and meetings sector. The 'open country' feel of Bedfordshire and the potentially 'vibrant buzz' offered by Luton can, when effectively packaged in terms of products and services, complement each other.

However, the product offering, in terms of the variety of hotels, conference and meeting venues is limited. There is a need for investment in the current facilities, and to attract new investors with an innovative range of products and services. Future development plans for hotels, conference and meeting facilities and infrastructure is encouraging and needs to be realised. Advances in technology, the opportunity for joint working and an entrepreneurial approach by the public and private sector working together presents an opportunity for significant and sustainable growth in the conference and meetings sector.

The UK conference and meetings sector: An overview.

The UK conference and meetings sector is currently worth in excess of £12 billion. Between 1994 and 2004 the sector achieved 11.3 percent compound growth. Residential conferences have shown the strongest growth and have increased in number even though the latest research shows that the number of nights spent at a conference is declining. (British Association of Conference Destinations - BACD). Conferences and meetings are getting shorter and smaller, but more specialised, focused and intensive. The length of time that delegates are prepared to stay away from the office, their customers, and becoming more important, how long they are prepared to stay away from home, is another key change.

Competition and the parallel sectors.

The sector is competitive with the constant arrival of new products, services and operators. One of the key competitors to conference centres and business hotels is the 'stand alone' office and meeting room companies. This parallel sector is very active, primarily located on business parks and the periphery of towns and cities.

The leading operators are;

- Regus - 800 meeting rooms in 98 locations.
- MWB Business Exchange Centres – 250 conference/meeting rooms in 30 locations.
- Verve Venues (to be re- branded De Vere Venues) -300 meeting rooms, 2400 bedrooms in 35 locations.

They offer very distinctive conference and meeting room facilities. There has been, and continues to be, substantial capital investment in the product and services. This competitive sector is taking market share from regional conference venues and business hotels. They are high achievers in many respects with occupancy rates of 70% plus, daily rates range from £45 to £60. Incremental spend per delegate is high.

Arts and Culture Venues are competing too

In addition to the above there is a host of new conference, meeting and event venues on offer, (as a result of lottery and joint private-public funding ventures) in newly built arts and culture centres. Practically every new concert hall or visitor attraction has a very good selection of conference/meeting and event rooms e.g. the National Space Centre, Leicester, the Royal Armouries Leeds. Car parking, technical support and security in these new facilities, along with innovative catering and ease of access to high quality IT equipment tend to offer a more attractive proposition to the conference, meeting or training organiser.

Key characteristics of successful competitors

These competing sectors share several key market disciplines and characteristics that are vital in the quest to secure and sustain the high yielding conference and meetings sector;

- The venues have 'high visibility' in the market place.
- Websites and marketing collateral are focused, easily accessible and reflect current trends.
- Databases are proactive.
- Investment in the 'hard and soft services' is strongly supported by training, development and career incentives for their teams.
- A variety of distribution channels are used to promote and create awareness of the product and services.
- Sharing information, creating partnerships/alliances – yet retaining their own 'distinctive identity'.
- These sectors 'cross borders' move the boundaries to seek new business.
- They have a high level of referrals and repeat business and exceptional profit margins.

Product and service issues in Luton and Bedfordshire

The theme of the tourism strategy is to capitalise on the strengths of the area to grow the value of tourism. One of the key challenges is to convert day visitors to staying visitors where possible. In looking at the conference and meetings market the research identified several limitations. One of these is the apparent mismatch between meeting room capacity and bedroom capacity in the area. Total meeting room capacity is 38,000 but bedroom capacity is under 3000. Of the 58 properties identified with meeting space, 40% have no on site accommodation and most have no relationship with other hotels to offer an accommodation package. Some of the proposed new developments will address this issue, but it is also important to bring providers together and work with them to create more overnight packages.

There is currently no single point of contact for meeting organisers that covers the whole area. Anecdotally, we have heard of enquiries for conferences of 200 plus being turned away due to a lack of venues. There is no easy database to access that provides a guide to venue size and facilities and no system for recording enquiries and developing repeat business. Luton and Bedfordshire have tried to address some of these issues in different ways. Bedfordshire has a conference desk located in Mid Bedfordshire, which has made a good start, but it is poorly resourced. Luton has published a venue guide and has worked with a private company to develop the meetings market for Luton. These initiatives should be built on and developed.

There is a need to define a set of unique selling points and distinctive features of the current conference/meetings product and services in Bedfordshire and Luton. Existing ‘quirky-distinctive’ venues need to be examined to see if there is a business case for investment in the product.

Recommendations for Growing the Conference and Meetings Sector

a) Creating alliances and partnerships

Most conference/meetings venues and destinations recognise that it is difficult and expensive to market their products and services independently. In seeking to establish a market presence, they must contend with factors such as the scale of competition, and the substantial cost of marketing and distribution. Thus, partnerships and alliances are essential. Successful partnerships recognize that ‘something has to be given to be gained’. Other features of successful partnerships and alliances are that; boundaries and limits are tested in terms of thinking, product and services, creativity and sourcing funding for the venture. It would be a mistake to opt for a partnership that offers the easiest, most comfortable option, particularly if the neighbouring partnership is prospecting for the same market segments and geographic area, and is not distinctive enough to create impact in the market place.

There has been substantial investment in Milton Keynes in terms of international hotel brands and conference and meetings venues. They are at an advanced stage of developing and setting up their own conference bureau. There are advantages to such an approach; MK has already done a lot of the groundwork, the essential customer enquiry and conversion information would be professionally handled. The databases would be proactive and offer access to a wider audience.

Recommendation 1:

1. Bedfordshire and Luton should establish a joint venture conference bureau with Milton Keynes (and possibly others) and allocate resource to this.

b) Achieving cost effective distribution

Once the product offering of the partnership is clear, it is important to find an easy route to market that can offer high quality service supported by a professional database. More and more organisations are looking to commercial providers. **Appendix 3** contains a Case Study describing how Kent has subcontracted its distribution to a commercial provider.

Recommendation 2:

1. Bedfordshire and Luton should seek a partner to assist with establishing a database, marketing, distribution channels and performance reports for all conference and meeting facilities.

c) Becoming Proactive in winning Business

In addition to servicing enquiries, the opportunity should be taken to go out and attract bigger events from the UK and international markets. The bidding process is competitive, complex and expensive and it is therefore sensible for this to be coordinated on a region wide basis. This initiative also needs to tie in with work done in preparation for London 2012. **Appendix 4** has a Case Study that looks at how the North West of England has established a bidding unit with a remit to attract national and international events to the region.

Recommendation 3:

1. That a conference bidding unit should be established at regional level by an agency such as EEDA or EETB.

d) Benchmarking and Improving Quality

The conference and meetings market can generate significant returns and it is business that is worth winning. However, standards are high and the market requires constant attention to detail and a desire to improve. Bedfordshire's great strength is its accessibility but this alone will not win repeat business. It is important that the new partnership implements a benchmarking system for existing products and compares its offering with a varied set of competitors.

In addition, attention needs to be paid to the people employed in this sector and efforts made to improve skill levels.

Recommendation 4:

1. Establish a Benchmark for existing product and measure against a varied competitor set. Assess the current knowledge and skills base of people involved in the sector. Through partnership, develop and implement an awareness and training/coaching programme. Monitor, recognise and reward improvements.

The Family Market

The combination of a number of iconic visitor attractions in the area with ambitious plans for development, combined with poor weekend occupancy in accommodation has pointed to the opportunity to develop and grow the family market. The possible arrival of Center Parcs in Bedfordshire will greatly add to the product offering, but it is our view that this market can be developed in the short term. The major short-term opportunity lies in the family short break market.

Market Characteristics

- **Value.** Family holidays show certain characteristics that distinguish them from other kinds of holidays. According to UKTS 2002, they are typically longer (47 per cent 4 nights plus vs. 37 per cent across all holidays); they are more likely to be taken at the seaside; more likely to be taken in July and August (34 per cent) so they are relatively inflexible; more car dependent (87 per cent); and more likely to be in self-catering accommodation.

- **Demographics.** Family dynamics have changed radically so that the classic 2+2 pattern is now less common. One quarter of parents are single parents, 20% of marriages are remarriages, 40% of children are born outside wedlock and women are having children later (Social Trends 2003 and Living in Britain 2001). Taking holidays with grandparents, stepchildren and groups of friends is now a common trend. One third of families think the tourism industry is still too focused on the traditional 2+2 model (Family Holidays UK Mintel 2002) so businesses that are responsive to these changes will succeed in this market. Government forecasts point to a decline of 7 per cent in the number of families with children under 16 within the next ten years (Government Actuary population projections 2003 – 2018). However, spending power is forecast to increase so the family market will continue to be a very significant sector.

- **Purchasing Behaviour**. Within the UK this is a highly competitive market and, with the availability of lower fares and peer and commercial pressure, especially on older children, the number of families taking holidays abroad is growing every year. Holidays are high on the list of priorities in the family budget. In the survey “Holidays by Life Stage UK” Mintel 2000, 50% listed buying a holiday as one of their top priorities over buying things for the home or a new car. Holidays are now seen as an essential rather than a luxury item and multiple family holidays and short breaks are growing in popularity.

- **Time** may be at a premium but cost is also a consideration as families are paying four or five times for everything. Being cost conscious applies irrespective of income bracket. Parents are looking for high perceived value and a quality experience. They have been influenced by home makeover programmes to aspire to high standards in their own homes and expect the same when travelling with their families. Clean and well-decorated, ideally self-catering, accommodation is required.

- **Influences on choice.** Parents are under pressure to maintain the work/life balance and time they spend with their family is precious. The purchase of a holiday is considered to be important and time and trouble is taken in researching options, mainly using the internet. Parents look for time to relax and unwind but their primary objective is to make sure that their children have a good time.

The choice of holiday is driven by the wants and needs of the family and this varies with the age of the children. The 2002 Mintel research suggested that 39 per cent of families are as happy to stay at home as going abroad. This also highlighted a preference for travelling by car, as going abroad is perceived to be a hassle with a young family with the potential hazards of hot climates and unknown standards of medical care.

The focus group research commissioned by the Steering Group indicates that time taken to travel is more important than distance per se. Families will schedule travel time to avoid motorway congestion or reduce the distance travelled for a short break to allow for congestion. (Qualitative Research Family Market: Arkenford Ltd October 2006)

Segmentation of the Family Market

The phases of family life will have an influence on the type of holiday taken. As the children get older and more sophisticated, their needs change and they become more susceptible to peer and media pressure.

A useful model for thinking about how the needs of children change is to group them according to their age range (Meet the Family – Family Holidays in the UK Insights 2004). This groups them as the Teletubbies aged 0-6, the Harry Potters aged 7-11, and the Pop Idols aged 12-16. (**Table 12**)

THE TELETUBBIES **AGED 0- 6**	THE HARRY POTTERS **AGED 7- 11**	THE POP IDOLS FROM **AGED12 –16**
• A need to keep young children active and for their parents to have time to themselves at the end of the day • Informal and self-catering accommodation • Hotels with qualified nannies, kids clubs, children's menus and babysitting arrangements • Family friendly restaurants with reasonably priced, appealing children's food, high chairs and baby food available • Leisure facilities with soft play centres that give parents some time off • Children's entertainment • Reliable childcare • Travel by car – gives flexibility (and easier to pack) • Rainy day activities like indoor play centres • Attractions such as farms, beaches and parks	• Easier to travel with • Happy to spend hours in pools • Family friendly restaurants can offer slightly more adventurous options • Theme parks and fun fairs very popular • Children's clubs can provide respite for parents but activities need to be geared to the age of the children • Safety and security are an issue when children are given some independence - Center Parcs score highly as children can do things by themselves but parents know that they are safe • Cleanliness • Value for money – theme parks and attractions are often perceived as expensive for a family unit • Activities for wet weather • Soft adventure like play grounds ("free" entertainment) • Souvenir shops – they do love to shop!	• They can be demanding and tricky to keep satisfied • They like more sophisticated leisure centres and theme parks and to go out at night (as long as the parents are happy it is safe to do so) • They like to go away with friends • Camp sites give them more freedom within boundaries • Wet weather options like cinema or bowling • They want action, adventure - all of this comes at a price which is especially hard on single parents

Table 11: The holiday needs of children by age groups

Strengths of the Luton and Bedfordshire Family Offer

The combination of some outstanding wildlife attractions, with the rural environment of Bedfordshire and a good supply of other varied attractions means that Bedfordshire can appeal particularly to the 7-11 group (Harry Potters) and can compete in the 0-6 market (Teletubbies). At present Luton is not strong for the family market and should not target this market. The challenge is to get families to stay and stay longer – by grouping activities that will appeal, targeting communications at this segment and working in co-operation with the well-known “honeypot” attractions.

Issues to address for the Family Market

Accommodation

There is a need to audit the quality of accommodation in the area. To persuade the UK market to stay in the area for short breaks there needs to be a more extensive supply of self-catering cottages and camping and caravan sites that are both affordable and of good quality. There are very few camp sites and these are mainly for a limited number of pitches. Self-catering cottages need to be well decorated, modern and well equipped.

If the shortage of camping and caravan sites reflects a reluctance to grant planning permission, this issue needs to be addressed. In the short term the existing hotel accommodation needs to review what is offered and how it can be adapted to the family market.

The Arkenford qualitative research confirmed that families are often motivated by deals on accommodation supported by knowledge of what’s on in the area. Current awareness of the area and what it has to offer is very low but the research groups were receptive to the idea of a ‘short’ short break. This break would comprise easy access to the destination, an attractively priced accommodation offer and at least two treats for the children. This would fit the bill for a special occasion, such as a birthday, or be appropriate for grandparents. It would also have the benefit of something that can be organised during term time, as it would not disrupt school attendance.

Quality

Although cost conscious, this market looks for quality. One way of inspiring providers to focus on quality is to develop a quality charter. An example of the quality charter used in Museums is attached in **Appendix 5**.

In 2007 Visit Britain is launching a family friendly quality scheme for hotels. This could be piloted by the area as a way of auditing and driving up standards.

Communication

Families use the Internet as the primary resource to research their holidays and days out. 64% of traditional families have Internet access at home – far higher than the average household at 40%. (Marketing for Tomorrow's Consumers, Mintel 2004).

Marketing material and websites should highlight the benefits of choosing this area and demonstrate how it meets the specific needs and wants of the family market. Any marketing campaign must promote the advantages of taking a family break in the area – using nostalgia, safety and familiarity as triggers

Marketing needs to be family driven not destination led – many websites talk about destinations and list what they offer instead of thinking about the needs of families and other segments. By highlighting a range of experiences that appeal to parents and their children the destination can demonstrate that it takes families seriously.

The best websites provide a matrix of information covering search by destination as well as by type of attraction/activity. Navigation needs to be fast with a clear layout and uncluttered design. Factual information should cover what to do, where to go, transport, maps, accommodation all of which needs to be detailed with prices, opening hours, special offers, location and ideally easily bookable online. Other "how to" information might include tips for holidays with children, what to do in wet weather, entertainment/events on a monthly basis and useful links.

Recommendations for the Family Market

1. Improve awareness and provide information about the range and diversity of family-friendly activities and attractions in the area. There are a few high profile attractions such as Woburn Safari Park and Whipsnade Wild Animal Park that appeal to a similar age group – maybe through a "Go Wild" Passport – to encourage visitors to extend their stay and/or return for future visits. This could also feature less well-known attractions such as the Bird of Prey Centre.

Recommendation 5:

Develop 'bundles' of attractions and promote these.

1. Children in the Harry Potter segment like games, animals, colourful graphics, shopping, action, jokes, sport and music. In order for them to relate to the website it needs to use appealing images of children doing the kind of things they aspire to do. For the younger age group the website can be brighter with cartoon characters and simple games. Examples of categories that would be appropriate for a family friendly website are:

    - Action and adventure
    - Get out there get active
    - Go wild
    - History heritage and spooks
    - Fun for young families
    - Colourful events
    - Games and fun stuff

Recommendation 6:

Develop web-based information for families

1. Budget conscious families are keen on “free” activities such as e.g. walking, cycling, museums, parks and playgrounds. The family section of the website should identify these amenities within the area. It can also highlight great family deals such as family tickets / discounts. The occupancy of many hotels drops at weekends so there could be an opportunity to offer weekend deals for families, especially when the hotel has leisure facilities and this could be tied in with local attractions.

Recommendation 7:

Highlight Price/Value including free activities in all communication

1. An area and national PR campaign geared towards consumer media will focus on the assets the area has for the family market and build on its strengths. The development of a family friendly charter and/or family friendly accreditation and how this translates into family friendly service will be fundamental to the story.
2. The primary aim should be to offer journalists an attractive package so they will come to sample what is on offer and write about it. This may necessitate hosting over half term and school holiday periods when families are more likely to be free to travel. The private sector should be encouraged to co-host media visits from national and regional newspapers and consumer magazines. The PR programme should also include a series of releases highlighting what to do and what’s happening over school holiday periods.

Recommendation 8:

Run a PR Campaign tailored to the family market.

1. Remember residents! There is a lot of new housing planned for the area, which will bring new audiences to the area. Develop a “what to do” pack for families relocating to new housing in the area – make this available through house builders, local libraries and TICs. This would focus on great family days out in the area.

Recommendation 9:

Develop a 'New Residents' pack and distribute it widely.

1. There are many attractions in the area that appeal to pre-schoolers providing an opportunity to extend the season. These can be targeted at grandparents as well as parents (who may be working).

Recommendation 10:

Develop Specific Programmes for Pre-schoolers

1. Visit England is targeting the 18 million holiday trips taken by Britons with families with children under 15, representing 39 per cent of all holiday trips. In June 2006 a new tactical campaign "Family Fun " was launched to promote family fun, family attractions, special offers and family friendly hotels. An interactive website designed with families in mind includes games and brightly coloured graphics. Information covers free attractions, theme and animal parks and tips for travelling by car. These campaigns present opportunities to buy in and generate a higher profile for the area both in print and on dedicated websites.

2. The East of England Tourist Board and neighbouring regions should also be seen as potential partners for any marketing activity. The geographic boundaries of the area should not limit the range of promotions.

Recommendation 11:

Work in Partnership on Family campaigns to maximise impact.

1. There is need to ensure that accommodation and attractions that target the family market offer a quality experience.

Recommendation 12:

Carry out an audit of the hotel offering and attractions in the region to identify those that are interested in the family market. Encourage hotels in Bedfordshire and Luton to sign up for the new Visit Britain family accreditation scheme.

Visiting Friends and Relatives

Introduction

Visiting friends and relatives (VFR) trips are defined as a visit where the main purpose of the trip is visiting friends and relatives. Whilst many trips will be accommodated in the homes of these friends/ relatives, some will make use of other forms of accommodation. Other types of trip, for instance a business trip may result in a stay with friends and relatives rather than in commercial accommodation, but as the primary purpose is business, this is not categorised as a VFR trip.

There are many possible triggers for a visit such as:

- A wedding or a party taking place;
- Those who have moved away from the area, returning home for a visit;
- A visit is combined with a business trip to the area;
- A visit to a son or daughter or perhaps a friend at university, taking in the opportunity to see some of the sights.

A growing and significant market

Inbound

Many destinations within Britain are recognising the value of VFR tourism. Since 1979 the reasons given by people for visiting Britain have changed dramatically. 25 years ago, 45% of visitors were coming for a holiday to 'see the sights'. By 2003 that proportion had shrunk to 34%. Over the same period the number of people coming to visit friends and relatives has risen by 250% to almost 8 million.

Domestic

Within the UK the VFR market is significant. UKTS 2003 data on overnight stays, shows that VFR tourism accounts for one third of all trips made and for about 25% of total spending with a value of £6bn

	UK Residents	
	Trips	Spending
	Millions	£ Millions
Holiday, Pleasure/Leisure	70.5	13,667
Visiting friends and relatives, mainly as a holiday	20.5	2,508
Business	22.3	6,142
Visiting Friends and Relatives	34.3	3,444
Other	3.4	712
All Purposes	151.0	26,482

Table 12: Trips and Spending by UK Residents. Source: United Kingdom Tourism Survey (UKTS) 2003

Day Visits

Visiting friends or relatives is also the third most popular activity for people taking a day trip,after eating out and walking or rambling.This is not a small market in terms of frequency of trips. When surveyed 19% of those responding said they had made ten or more trips during the previous 12 months

The VFR Market in Bedfordshire

This is a significant market for Bedfordshire with just over 6 out of 10 people who visit the area staying with friends and relatives. Research in 2003 showed that just over 1 in 3 visitors are coming to Bedfordshire with the main purpose of seeing friends and relatives. However, despite this the return achieved from these visitors is lower than the regional average and lower than the national average.

Other Aspects of the VFR Market

There are a number of different variations which involve relatives and friends coming together but not necessarily in the family home. These reflect the social changes that have taken place over recent years and are indicative of current lifestyles. Global events, such as 9/11, have also been identified by some as bringing about change by making people rethink how they spend their leisure time with the recognition that families and friends are very important..

Families Coming together

Families are now increasingly spread around the country as a result of changes in personal circumstances and increased mobility associated with careers. The result of this is that families will seek opportunities to come together and will look for a location which is suited to them all. Hotel or self catering facilities can meet this need and cottage operators report huge growth in the demand for very large properties.

Friends meeting up

Taking a holiday or a short break with friends is not new. However, changing social patterns mean that people have developed a greater need for companionship beyond the traditional nuclear family. One person households under pensionable age have increased to 14% of total households. Along with this change has been an increase in disposable income and a greater propensity to travel.The growth of the web and the appearance of websites such as Friendsreunited, used by all ages, is making it easier for people to find old and new friends and to keep in touch with them. Research shows that a third of such trips are taken in the UK and that these are often in local or nearby areas and more often serviced accommodation is used.

The role of residents

Traditionally VFR tourism has not been developed because of the low spend by visitors compared to those staying in commercial accommodation. However, this does not take into account the role of the resident as the host. Research has shown that the host will incur additional expense when having visitors stay. On average the host will have an additional spend of £108 per visit. 50% of hosts feel they should pay for everything when a visitor is staying with them.

Hosts also play a very significant role in promoting to visitors things to see and do in the area. Almost half of those acting as a host will look for a local event or an attraction to go to with their visitor. They are also likely to go at least once to a local restaurant. For the majority of those who have friends or relatives staying with them, the effect is that they become much more aware of what their area has to offer.

One of the incidental benefits of a focus on this market is the fact that this will help residents develop a sense of civic pride, something that is key to the future of any successful and sustainable tourism development in the area. The poor perceptions of the county of Bedfordshire and Luton in the MORI survey need to be turned around. A focus on the VFR market will contribute to addressing this.

Recommendations for the VFR Market

The primary target for developing this market should be residents. Currently there is no co-ordinated activity aimed at residents encouraging them to host visits or helping them to plan a visit.

Key groups identified as those that could help strengthen VFR tourism in the area are long-term residents, students and ethnic minority residents that have family members living overseas. The common theme for all of these groups is the need to have access to reliable and up to date information about attractions and events within the area.

Local Residents

A number of destinations now hold events that are specifically aimed at residents to encourage them to invite visitors. In 1996 the City of York established their 'Residents First Weekend'. This weekend gives residents the opportunity to see why so many tourists come to York and what they do when they get there. It is co-ordinated by the city's tourism partnership; around 50 of the city's museums, tours and attractions open their doors free of charge to local people. In addition there is free entertainment and special deals in restaurants and hotels.

Appendix 6 includes a Case Study on Birmingham and shows how it has developed an initiative called "Be a local tourist".

Bedfordshire does participate in a similar scheme organised at national level, the 'Heritage Open Days' event, which takes place in September and involved four properties in the area.

Recommendation 13:

Develop co-ordinated 'Open Days' across the area aimed at residents

1. Build on the English Heritage 'Open Day' event
2. Look at best practice of how to involve attractions and manage such events
3. Develop a partnership to recruit participants and steer and co-ordinate development

There is also the need to recognise that over time with expansion taking place in the area and plans for the building of new homes there will be new opportunities to target new residents to welcome them to the area and to inform them of what there is to see and do on their doorstep.

Students

There is a significant student population in the area, with 18,000 students at the University of Bedfordshire with 3,000 from overseas. They could significantly benefit from easy access to information advising them of what there is to see and do, as well as where to stay when a visit is planned by parents or other members of their family and friends.

Recommendation 14:

Develop stronger links with Universities and colleges.

1. Make available to students information about accommodation and places or events to visit across the area, to help them easily plan potential trips by themselves or with their family and friends.

Ethnic Minority Groups

The 2001 census shows that Bedfordshire and Luton has significant ethnic minority populations with Irish, Polish, Italian, Indian, Pakistani and Caribbean groups constituting 20% of the population. The anticipated changes in inbound air traffic at Luton airport offer the prospect of developing new opportunities to develop this particular market further, by showing how easy it is for friends and relatives from overseas to visit the area through this gateway. New routes between Stansted and India and faster surface connections from Europe via St Pancras will help both business and leisure.

Information and marketing should reflect the diversity of the area. If the inbound market is to be developed and spend increased it is key that these groups feel able to participate fully in what the area has to offer.

Recommendation 15:

Develop the Inbound VFR market

1. Explore suitable marketing opportunities with airlines and airports aimed at ethnic minority residents encouraging them to invite family living overseas to visit, to understand how they can reach the area easily and what there is to see and do when there.

Information

Information plays a key role for both residents and visitors alike. Unless they are aware of what there is to see in the area or events that are taking place, via means of easily accessible accurate and reliable sources, the opportunities to encourage them to participate in tourism related activities diminish.

Recommendation 16:

Improve the provision of information to residents

1. Consider how information is communicated to TICs and other information points in the area and understand what improvements are necessary
2. Review the information that is reaching residents about places to see and events in the area and how they are receiving it.
3. Target local publications with regular email updates on events and special offers.
4. Make better use of display including 'Points of Presence' in the area
5. Run workshops for tourism businesses on getting local media coverage.

Links with other target markets

VFR tourism is already strong within the area. However to strengthen this market it is important to recognise the links with other market developments in Bedfordshire.

Any development of the family market which improves the experience for families and meets their needs whilst holidaying or taking short breaks in the area, is likely to benefit resident families as well and help underpin a positive and quality experience for them.

Business travellers stay with friends and relatives so it is worthwhile to make residents aware if meeting facilities are improved. All visitors benefit from investment in improved information provision.

Adult Short Breaks Based on Events/Activities

This market is characterised by couples or groups of adults seeking an opportunity to do something different, or to escape and recharge their batteries. Broadly speaking, the potential offer in Luton and Bedfordshire centres around two areas. The first of these is in relation to the more rural parts of Bedfordshire where the small villages and attractions such as Woburn Abbey the opportunities for good food, antique shopping and a tranquil environment would combine into a good product offering. The other opportunity is in relation to a more urban visit, which is likely to revolve around specific events and activities in Luton and Bedford, for example the River Festival in Bedford and the Carnival in Luton.

In the short term it is possible to capitalise on the range of 'experiences' that are available in the area. These include Monster truck driving, off road jeeps, bodyflying, shooting, walking with elephants etc. These can be highlighted in promotions and are ideal for supporting the PR campaign for the area.

In the medium term opportunities can be developed around the growing range of cultural attractions and events. Our view is that the product offering is currently not sufficiently strong for this to be a market to be promoted to in the first few years of this strategy, but that this market has great potential and that this product offering should be developed and specifically targeted as a segment leading up to London 2012.

Recommendation 17:

Develop a wider range of short breaks

1. Work with partners to develop a wider range of short break offers including a 'green' offering and event/culture based breaks in Luton and Bedford.

Recommendation 18:

Raise visitor awareness of events and products

1. Establish a system for working with the cultural sector to ensure that new events and products can be brought to the attention of visitors as they come on stream. Identify an events programme that will be of interest to residents and visitors in the lead up to 2012.

Olympics

The Olympics does not represent a segment in the same way as the opportunities described so far. However, as it is such a significant event, it offers a time limited opportunity to develop some key initiatives that will support the wider tourism growth strategy. It may well be project managed and funded separately but it is recommended that all actions are closely integrated into the overall development programme.

Introduction

In July 2005 London succeeded in winning the right to host the Olympic games in 2012. Since that time a great deal of discussion has gone on about how best to maximise the opportunities presented by this event, particularly for tourism. While the Games are based in London it is the stated objective of the government that the Games will be a national event and that all parts of the country will be able to participate in and benefit from this opportunity.
The East of England region is well placed to capitalise on this opportunity as it is hosting some events, it has direct transport connections from the region to the Olympic site and it can easily be used as an operational base for those participating in or visiting the Olympics because of its location in the hinterland of London. Bedfordshire and Luton are particularly well situated to benefit from good transport connections, as well as from their expertise in exercise science, media training and a major airport.

One of the lessons learned from countries that have previously hosted the Olympics has been that it is important to establish a clear structure for organising and running this event and to ensure that the communication channels operate efficiently from the start. With this in mind a decision making structure has been established that links all levels. At national level there is a Nations and Regions group. The East of England has a representative on this group. EEDA has established a coordinating group and appointed a regional Olympic coordinator. Bedfordshire and Luton has a representative for the area that links in to the EEDA structure and this is seen as the primary means of communication and coordination. Within the area a group has been established (BOOST) to coordinate all Olympic related activity. All the recommendations from this strategy will be fed through to BOOST and a communication link will be established to ensure that tourism development is proceeding in tandem with all other actions. The Tourism Partnership will work with BOOST to secure funding for Olympic related tourism initiatives.

Planning

In preparation for this major event, the sponsor department for tourism, the Department for Culture, Media and Sport (DCMS) has published a consultation document inviting those in the industry to shape an Olympics strategy. This consultation process will be complete by the end of 2006 and the strategy document is due to be published in mid 2007. The regional body, the East of England development agency (EEDA) commissioned a separate study to look at the likely economic impact of the Games on the East of England region. This report was completed in July 2006 and this document concluded that the economic benefit to the region could be £600 million. It confirmed that the major benefits include

additional contracts won by local business, upskilling of the population in the region, and the development of facilities that will remain as a legacy to the region. It confirmed that the major tourism benefit from the Olympics would come in the years before and after the Games.
The document sets out the following regional priorities:

1. Put East of England on the map by achieving growth in visitor expenditure 3% higher than normal growth in the years 2008 to 2011 and 2012 to 2016.
2. Develop East of England's businesses
3. Skills improvement and capacity building
4. Improve sporting performance and aspirations
5. Maximise opportunities for engagement in culture
6. Stimulate improvement in infrastructure
7. Maximise opportunities for participation and social inclusion

Opportunities for the visitor economy

The Grant Thornton report identified that the tourism industry that will be the major beneficiary of the Olympics. Bedfordshire and Luton needs to ensure that it takes advantage of this opportunity but any initiatives that are brought forward or developed with London 2012 in mind should be supportive of the broader direction of the tourism growth strategy. If this approach is adopted it will ensure that the Olympics can be used as a catalyst to move in the right direction but at faster pace than might otherwise have happened. The regional objectives have therefore been reviewed to identity those that are relevant to growth in the visitor economy and recommendation have been made for specific actions that will support the broader tourism growth strategy.

Objective: Put East of England on the map

The regional objective is primarily about growing international tourism and business tourism. Bedfordshire and Luton currently has a very small percentage of visitors from international markets. It does well from domestic business tourism but could grow the potential of international business tourism. The key issue in this area is to ensure that a targeted programme of activity is planned in conjunction with the relevant inward investment agencies such as East of England international, Renaissance Bedford etc. There are several industry sectors that have already been identified as having potential for growth and these should be the focus of Olympic related activity.

The regional review highlighted a shortage of conference space and recommends that two or three significant conference facilities should be fast tracked for development within the region. The Napier Park development includes conference facilities and this looks like an ideal opportunity to advance a new facility for the area that can also benefit from proximity to Luton airport.

One of the features of recent Olympic games has been that a very large number of journalists visit during the event. Only a proportion of these journalists are accredited by the IOC and in Sydney an estimated 20,000 non-accredited journalists were in Australia in the lead up to and during the Games. The interest by media organisations will build from 2008 and being able to promote to and target these journalists is a good opportunity for the area.

One of the advantages that Luton and Bedford has is its excellent transport links into London and into Stratford. An estimated 80% of the audience for the Olympics will be domestic visitors who wish to take advantage of this once in a lifetime opportunity. Many families will want to take their children to see an Olympics event and this presents opportunity for the area. Recent events have meant that families have been concerned about security issues in relation to London and they are also price conscious. Luton and Bedfordshire can offer a very good option for families, as they can stay within easy reach of the Games and attractions of London without the price penalty that will apply in central London.

Recommendation 19:

Put East of England on the map

1. Identify key international markets for business tourism in conjunction with the inward investment agencies and design a targeted programme of activity in these markets.
2. Advocate that the conference centre at Napier Park is one of the conference facilities that is fast tracked in preparation for London 2012
3. Commit to hosting a visiting international journalist programme to commence in 2008 and run through to 2012
4. Position the area as ideal for UK families during the Olympics

Skills improvement and Capacity Building

All the research into customer needs indicates a continuing desire for a quality experience, which depends on well-trained and professional staff. There has been an audit of skills required for tourism and hospitality completed at regional level and a supporting document that looks at the specific needs of Luton and Bedfordshire. In addition a specific skill development programme related to the Olympics "On Your Marks" has been developed but at present this does not include the skills required in tourism and hospitality.

Bedford and Luton is fortunate in having a centre of excellence at the University of Bedfordshire in media training and a training programme is currently underway to train Chinese media teams in advance of the Beijing Olympics. This expertise opens up many opportunities to develop a national and international reputation.

The volunteer programme also offers the opportunity to enhance the skills of all, particularly young people. In Manchester in the lead up to the Commonwealth Games the volunteer programme was used specifically to identify individuals that were excluded from the work force and volunteer training was used to enhance their skills and improve their employability. The tourism and hospitality sector can offer a wide range of opportunities for people looking for their first job and it is recommended that Bedfordshire and Luton use the volunteer programme in the same way as was done by Manchester.

Recommendation 20:

Skills improvement and Capacity Building

1. Identify Olympics related tourism priority training needs for Bedfordshire and Luton
2. Develop a version of the “On Your Marks” programmes for tourism in conjunction with EEDA, LSC etc.
3. Commit to training at least 200 people per annum (2007-2012) on customer care
4. Work with the university to capitalise on existing expertise in media training
5. Commit to providing 400 volunteers to the Olympic programme and provide them with skill development programmes.

Engagement in Culture

One of the features of hosting the Olympic games is that the host nation also has the opportunity to organise and run “the Cultural Olympiad.” The interpretation of what a Cultural Olympiad means is at the discretion of the host nation and the programme can run throughout the 4 years in the lead up to the Games or can be focused in a more concentrated period. Discussions on the nature and format of the Cultural Olympiad in the UK are ongoing but it is an aspiration of the government that the Cultural Olympiad will celebrate the connection between Britain and the rest of the world and will be a way in which all parts of the UK can be involved with the Olympics. Within the cultural programme there are a number of events that are required by the IOC such as the Torch Relay, the Opening and Closing ceremonies and medal ceremonies. Beyond this, the range of events can vary enormously.

Events had already been identified by EEDA as an important stimulus to developing tourism and discussions have been taking place on how to exploit and grow the existing events within the region. The Grant Thornton report recommends that EEDA develop a major event strategy that would look at growing some regional events and also bidding to host international events within the region.

One of the projects in development in Luton is the National Centre for Carnival Arts. This gives Bedfordshire and Luton a significant opportunity to build an international reputation for performance arts based around the tradition of carnival. The opening and closing ceremonies will require particular expertise in a range of skills such as costume making, dance, display etc and the NCCA will be well placed to offer these skills and grow their expertise. The existence of this set of skills within Bedfordshire and Luton should be used to good effect and the centre could provide the ideal focus for coordinating the cultural programme for the area.

Another opportunity is based on the experience gained from running the Bedford River Festival. The biennial event attracts 150,000 people and is very popular in the area. This could be a key part of the cultural Olympiad being planned between 2008 and 2012.

Luton is a town that is transforming itself and it has identified that its programme of capital works will start to bring visible benefits in 5 years. By this time the physical transformation of the centre will be very evident and therefore the Olympics provides a perfect opportunity for a new image of Luton to be promoted. Luton already has a young population because of the presence of a large number of students and these two strengths should be used to good effect during the Olympics. Luton could model itself on several German cities that enhanced and transformed their reputation during the football world cup in 2006.

Recommendation 21:

Engagement in Culture

1. Work with EEDA on the major events strategy
2. Identify three major events that Bedfordshire and Luton will bid for by 2012
3. Agree which events will be the areas contributions to the region's cultural programme for the Olympics
4. Promote the National Centre for Carnival Arts as a flagship venue and coordinator of the cultural programme
5. Promote Luton as the Olympic "party town" for the area with a programme to run during the Olympics

Stimulate improvements in infrastructure

Luton and Bedfordshire have excellent transport facilities for air, road and rail. There is work to be done on the connections between these methods of transport. Capital works are already in progress to improve connections such as junction 10a of the M1 linking to Luton airport. These transport gateways are not currently easy to navigate for visitors and the quality of welcome is poor. Luton and Bedfordshire therefore have an advantage in that they do not need to develop major new infrastructure, as this is already in progress, but they can use the opportunity of the Olympics to transform the ease of use of the transport network and enhance the quality of welcome.

This investment will leave a legacy beyond the Olympics as businesses and visitors will benefit from this continuously both before and after the Olympics. At a national level Visit Britain has established a working group to look at the quality of welcome to Britain through all the major transport gateways and recommend a series of improvements. It is suggested that this should be replicated within Luton and Bedfordshire.

Recommendation 22:

Stimulate improvements in infrastructure

1. Audit all transport gateways in the area for the quality of welcome
2. Identify a 5-year programme of improvements and carry these out
3. Create a travel information facility for websites that features all forms of transport.
4. Commit to welcome points at all transport gateways during the Olympics

Summary

The recommendations listed above are all practical but they represent a significant workload. These are summarised in the **Action Plan.**

6: COMMUNICATION ISSUES

Emerging Themes

It is of enormous importance that any marketing strategy looks to consumers of the future rather than replicating what has worked in the past. Henley Centre/Headlight Vision has published a useful summary of emerging trends, and these trends can be summarised as follows:

Stop/Go Lives

This is a development of a trend that has been around for the last ten years where people feel that they have less time available to them. This trend is now manifesting itself in the desire for people to do more in a day, and this extends to a desire to do more when they are on holiday. It has manifested itself in a desire for people to see several opportunities for entertainment in one area so that they can combine two or three experiences in one day. The Henley survey identified that only 19% of UK consumers now say that they want to eat, drink and lie in the sun when they are on holiday.

Experiential Society

This trend picks up on the fact that people in the UK now have more disposable income and the majority are able to afford the necessities, and many of the luxuries of life. This has meant that people are now looking to spend their disposable income on buying experiences, rather than things. They therefore look at a holiday or a short break in terms of the range of experiences that can be offered to them, rather than thinking particularly about one element of that experience e.g. the hotel.

Professional Consumers

This is characterised by the fact that people are more confident in their buying and have been empowered by the Internet. They demand good service and are well informed about price and value. Consumers are less likely to go for budget or luxury exclusively, and will look for value that suits them. An example of this might be choosing to stay in a Travel Lodge, but buying the most expensive seats at Covent Garden that night. There is no longer seen to be any inconsistency in this behaviour as save and spend is quite normal. This means that both a luxury and a budget item can potentially be bought by consumers with a wide variety of disposable incomes.

Keeping it Real

This has often been expressed as a desire for authenticity, but it is manifested in consumers seeking comfort and an element of nostalgia. There is a real interest in local food and crafts and a desire to get back to a time when things were less global, processed and cloned. For visitors, this manifests itself in the desire to see local produce on menus, an interest in understanding more about the history of an area, and nostalgic foods.

Making a Difference

This has been commented on by the Henley Centre as one of the fastest growing trends they have observed in the last 30 years. Consumers being concerned about ethical considerations when they are buying and wanting to know more about the environmental impact of their behaviour show this trend. There is a general desire, particularly amongst young people, to want to make the world a better place and to take a real interest in conservation issues. The growing lobby, which suggests that aircraft movements should attract a higher tax, is evidence of this trend, although it has not yet manifested itself in any reduction in the number of flights taken by consumers. For destinations wanting to attract visitors, this awareness can be recognised by including information about the environmental policies of the business in promotional material, and offering visitors mechanisms to make a contribution to reducing their environmental impact during their stay.

These trends contain some important messages for the way in which a visit to Luton and Bedfordshire can be presented. It also gives useful signposts to individual businesses about how best to appeal to the changing consumer. The key points from these insights have been used to inform the approach to branding.

Branding

The MORI survey and the subsequent Omnibus survey has identified that there are very different perceptions of Luton, Bedford and Bedfordshire in the minds of the potential visitor. At present Luton has a very negative image, Bedford less so but still negative, while Bedfordshire is not known. Interestingly, the focus group research suggests that Bedfordshire should make more of the ‘shire’ in its title as it suggests a rural experience, which was seen as positive.

These negative perceptions or lack of image do not just affect the visitor, they deter business investment and prevent the area attracting the most talented people. It is clear that this is a bigger agenda that is recognised by Local Authorities in Bedford and Luton. There is an intention to change these negative images and this is being addressed by work in progress on Master plans for Luton and Bedford. One of the challenges in developing a branding strategy for the visitor is that this will only work if it reflects the brand values ‘owned’ by residents. Bedford is currently working with consultants on the development of branding for Bedford but there is no clear agreed vision for Luton or Bedfordshire that can inform a destination brand strategy.

Following consultation and discussion with the Steering Group it was agreed that a brand approach should be developed that would highlight the positive features of the whole area with sufficient flexibility to offer different experiences to different customers. The emphasis on experiences would be reflected in the web address ‘ExperienceBedfordshire.com’

The ‘brand essence’ i.e. what we want the visitor to feel about the destination, is encapsulated in three key words:

- Fun
- Fresh
- Easy

The elements of each are:

Fun

A huge variety of things to do
A time to learn and play together
Wild and with a sense of adventure
Exciting new things to try

Fresh

A sense of discovery, a new place
Wind in your hair
Fresh, healthy food and lifestyles

Easy

Compact
Central
Warm welcome
Simple pleasures

These core messages will be translated into a style that depicts this in picture types, colour schemes, and use of language. This will be demonstrated in the redesign of the web site and will also generate a set of images that businesses can use in their own promotions.

The navigation of the website will then take visitors to 'solutions' based on the target markets identified. So, the family section will include features such as 'It's raining', 'Party time' etc. This approach will allow for new product and 'solutions' to be added as they become available.

All businesses and public sector bodies will be encouraged to link to and work with this approach to create a virtuous circle of messages being reinforced and supported.

Visitor Information

A complete review of visitor information is outside the scope of this document, but there are several steps that can be taken in the short term to improve on line information. Money has already been invested by EEDA and BLEDP in the development of a website for the area - visitbeds-luton.com. Over the next few months this will be revamped to become experiencebedfordshire.com. The focus group research confirmed the fact that the Internet is a primary source of ideas for all markets. It also supported the view that visitors like to receive information that has been filtered for 'people like us'.

This is why the approach to web development described above is so important. The website needs to be the primary route for visitors to find out about the area. The content needs to be constantly refreshed and the site needs to be able to interoperate with related sites such as the Family fun section of the Visit England site.

Over time the area needs to build a portfolio of segment related web information that will fit with and support the PR and promotions campaign themes that are run during each year. The look and feel of this information should reflect the relevant brand messages.

The main issue is that everyone in the area commits to building a web presence for Luton and Bedfordshire by using a common web address and making this a core part of any communication to visitors.

It is recommended that all the public agencies in the area provide a direct link to the portal that is developed for visitors rather than trying to provide limited visitor information on their own sites.

Recommendation 23:

Establish a visitor focussed web site offering tailored material

1. Build on the investment made to date to establish a visitor focussed web portal that offers tailored material to market segments and reflects the agreed brand values.

Development

The section on Opportunities identifies several recommendations on product development. It is also important that the area keeps abreast of the way the market is changing and actively looks around the world for examples of best practice.

The lack of good quality information on the motivations and perceptions of visitors to the area has hampered the development of tourism. The 'wish list' of data requirements is a long one and it is unreasonable to assume that the area will be able to support major investment in data collection. However, a priority is to establish a regular measure of visitor satisfaction. This will help to track improvements in performance, will identify investment priorities for the public sector and will be invaluable in helping businesses to respond to the market place.

Recommendation 24:

Create a monitoring framework

1. Audit existing data sources and establish a monitoring framework. Develop a visitor satisfaction survey and introduce it across the area.

7. MAKING IT HAPPEN

There are several reasons for taking tourism in Bedfordshire seriously. It is an industry that already supports over 9,000 jobs, and the level of planned investment and the opportunities identified in this strategy mean that many more jobs can be created. There is also the opportunity to improve perceptions of the area amongst residents and visitors. The opportunity is enormous, but so is the challenge. The consultations undertaken as background to this strategy have highlighted that there are a number of different agencies interested in growing the visitor economy, and in seeing Luton and Bedfordshire succeed. There is no single agency that currently has responsibility for developing the offering for visitors and promoting to those visitors. There are many agencies that currently make a contribution to tourism and many very successful businesses that have grown as a result of success in tourism.

The challenge, as ever, is to turn strategy into action and this section addresses the issue of how best to organise this effort and energy to ensure that the opportunities set out in the document are realised. In arriving at recommendations, the consultants have considered the following issues:

- There are two growth areas that impact on Bedfordshire and Luton. The Milton Keynes South Midlands growth area and the Luton and Dunstable growth area. Both of these growth areas are in the process of creating agencies with the responsibility of overseeing all initiatives that will encourage the economic health of the growth area. In the north of the county the local delivery vehicle (LDV) is already established and is called Renaissance Bedford. Its remit extends beyond the town of Bedford to cover all of the northern and mid part of the area. The southern delivery vehicle is yet to be established, but it is expected to come on stream by the beginning of 2007. These two agencies together will cover all of the areas within the administrative boundaries included in this study.
- In the past, there have been partnerships involving Hertfordshire, Luton and Bedfordshire, and there is ongoing partnership work between Milton Keynes and some partners in the mid and north Bedfordshire area. In addition, Northamptonshire has expressed an interest in working in partnership with Bedfordshire.
- Pressure on local authority budgets mean that tourism specialists, such as tourism officers, are few in number and this provision is unlikely to increase.
- There is no strong private sector group that has worked together on joint promotions that promote the whole area in the past.
- The East of England Tourist Board has recently been restructured to become East of England Tourism. A new relationship needs to be established between the regional tourism body and any structure established for the area.
- There is an overwhelming view that any structure created should be simple and inexpensive and work with the grain of what is already in place.

Structures in other parts of England

Many other areas of the country have debated how best to organise themselves to grow tourism and, broadly speaking, have adopted one of three types of structure. These are:

1. An agency that is a public/private organisation with a remit to develop tourism alongside inward investment. An example of this is in Hull and East Yorkshire.
2. A stand-alone organisation that has a remit to develop tourism funded by the Regional Development Agency and private sector contributions. These organisations sometimes have a wide-ranging remit and are called Destination Management Organisations and sometimes have a narrower focus on marketing and promotion and are called Destination Marketing Organisations. They are typically established as companies with a Board, and a complement of full time staff. The RDA contribution to their costs is in the region of £0.5m. Examples of this are in Liverpool and Merseyside and Northumberland Tourism.
3. A Tourism Partnership that brings together the public and private sector but is not always set up as a separate company. These partnerships may have a small number of staff or may work on the basis of secondments or shared resource. An example of this is in West Yorkshire.

In Luton and Bedfordshire all of the public sector agencies have been involved in the development of the strategy and are committed to seeing successful actions arising from this work. It is encouraging to see that all of the agencies have adopted a pragmatic approach to deciding how best to deliver the tourism strategy and action plan. It is clear that the amount of additional cash that can be released is limited but there is a willingness to support the strategy and influence spending decisions wherever possible.

Recommended Structure

Strategic Tourism Advisory Group

In view of the above considerations it was recommended that Luton and Bedfordshire should establish a partnership called the Strategic Tourism Advisory Group (STAG). STAG should be formally established with a Board but should seek to work very closely with the existing agencies to ensure that the actions in the Tourism Growth Strategy are delivered. The primary role of this board would be to oversee the work of the steering group, to secure funding to support the strategy, to report on progress on an annual basis, and to commission a review at the end of the fourth year in order that an action plan for 2012 and beyond can be commissioned.

The Steering group discussed options for membership of STAG. It was felt that it should be kept as small as possible and include representation from the major agencies that have control over investment, as well as representation from the private sector. The group discussed various models for establishing the board – a board that was representative of the geography of the area, a board that was representative of industry sectors and a board that was based on a mix of skills and experience. Having reviewed these options the Steering group recommended that the board should be based on a mix of skills and experience with a brief to ensure that all geographic areas are represented. It was agreed that the board should be appointed by the Steering Group for the first year to maintain the momentum developed and then nominations would be invited in the second year for future board membership. The composition of STAG will include:

Chair – from private sector, Luton airport, major visitor attraction, conference sector representative, accommodation representative, BBC Three Counties Radio, Branding agency, University of Bedfordshire, Forest of Marston Vale, Team Beds & Luton, BLEDP, EEDA, EET, BedsCC, Renaissance Bedford, Luton and Dunstable LDV, Bedford Borough Council, Luton Borough Council, Mid Bedfordshire District Council, South Bedfordshire District Council, Bedfordshire and Luton Learning & Skills Council.

Steering Group

It was agreed that there would also be a need for a group that got involved in the detail of delivering the actions in the Action Plan. It was agreed that the existing steering group had built up valuable experience in developing the strategy and therefore it was desireable to retain some of this expertise, subject to the individuals being able to commit further time. The membership of this group will also be reviewed in the second year.

Tourism Forum

In addition to the partnership board a Tourism Forum will be established. This will be a much wider group of organisations that have an interest in tourism and the delivery of the strategy and will include representatives from the District Councils. This will formalise the successful consultation events that have taken place in the last year. Meetings of the Forum will take place 2 or 3 times a year and members will be invited to comment on the progress and direction of the Strategy and Action Plan.

The Partnership Operation

The partnership will be ‘hosted’ by an existing organisation. The host organisation will act as banker for the finances of the partnership and will handle funding applications and administration. Bedfordshire County Council has agreed to allocate an Officer to work on the management and delivery of the strategy. STAG will actively seek to attract further cash and ‘in kind’ support from public and private sector bodies. STAG will be accountable to all organisations that provide funding and to the private sector collectively.

The partnership will work alongside the two local delivery vehicles and BOOST to ensure that the tourism strategy and related actions are followed through. Active involvement of the private sector is seen as essential but it is not proposed that there should be any formal membership structure. Joint marketing initiatives will be facilitated by the partnership.

As far as possible it is intended that the Tourism Strategy becomes integrated into the priorities for each public sector agency. All councils will be invited to adopt the Strategy and all agencies will be invited to identify actions that they can lead on or support.

Geographic Boundaries

Throughout the consultation on this strategy it has been clear that there are many and different groupings of relationships that will work for a particular initiative, and that flexibility in attitudes towards partnership is essential in this part of the world. It is proposed that having a "cross boundary" approach to partnership working should be encouraged. In particular it is recommended that initiatives on business tourism look beyond the immediate Luton and Bedfordshire area and seek to work with and learn from the Milton Keynes experience. Developments in the family market may well bring in new relationships with Northamptonshire, the Chilterns, and Milton Keynes, and work on the Olympics will open up opportunities for joint working with London. It is suggested that this should be dealt with on a product driven basis and that the structure should not try and accommodate all possible relationships, but give flexibility.

Resources Required

The strategy sets out an opportunity to significantly increase the size of the visitor economy, create local jobs and change the perception of the area. This will require the investment of time and money. While marketing activity is required, it will not be enough without an investment in developing the product and supporting infrastructure. Our view is that an investment of £0.4m per annum is required to develop the market. Some of this resource is for skilled people, some for promotions and some for essential support activity such as visitor surveys. It may be that some of this requirement can be covered by 'in kind' support such as the secondment of staff. It is anticipated that Olympic related actions will be the subject of separate funding applications. It is also likely that more will be required in the first two years to allow for the development of websites and promotions materials.

The Steering Group has started the process of identifying financial and 'in kind' support. EEDA has confirmed initial financial support and will consider applications for project funding. The Action Plan has been prioritised to allow for the fact that the total level of resource required will not be available in the short term and the new Strategic Tourism Advisory Group will lead the process of sourcing financial support and adjusting actions in line with resources.