

Interim Findings
**Strategic assessment,
recommendations and
marketing plan for tourism in
the Borough of Tewkesbury**

24 November 2020

www.kellyballard.co.uk



Work programme – review

- **External market assessment** – visitor behaviour and digital trends
- **Internal assessment** – tourism product, current tourism resource, stakeholders
- Assessment and recommendations of **council support required for key projects**
- Review of **key partner stakeholders, business models, initiatives** and the opportunities they present



Work programme – recommendations

- **Key priorities for strategic direction for tourism** in the Borough to 2025, including the response to COVID-19
- **Recommendations to engage and support tourism businesses**, including working with Gloucestershire Airport, key events and TIC
- Headline ideas for **income generation and business model**
- Outline **marketing focus to 2025**
- Suggestion of **resources needed**



My experience includes...



WESTONBIRT 2003-2009

- Increase in visitor numbers, 250k -> 350k



BRISTOL 2009-2014

- Brought £70 million into the local economy over 3 years (RGF £1m investment)



CHELTENHAM 2016-2019

- Created a new DMO – £180k public/private collaboration
- Website visitor growth – 276k (2016) -> 400k (2019)



FOREST OF DEAN & WYE VALLEY 2019-2020

- Tourism strategy
- Website redevelopment

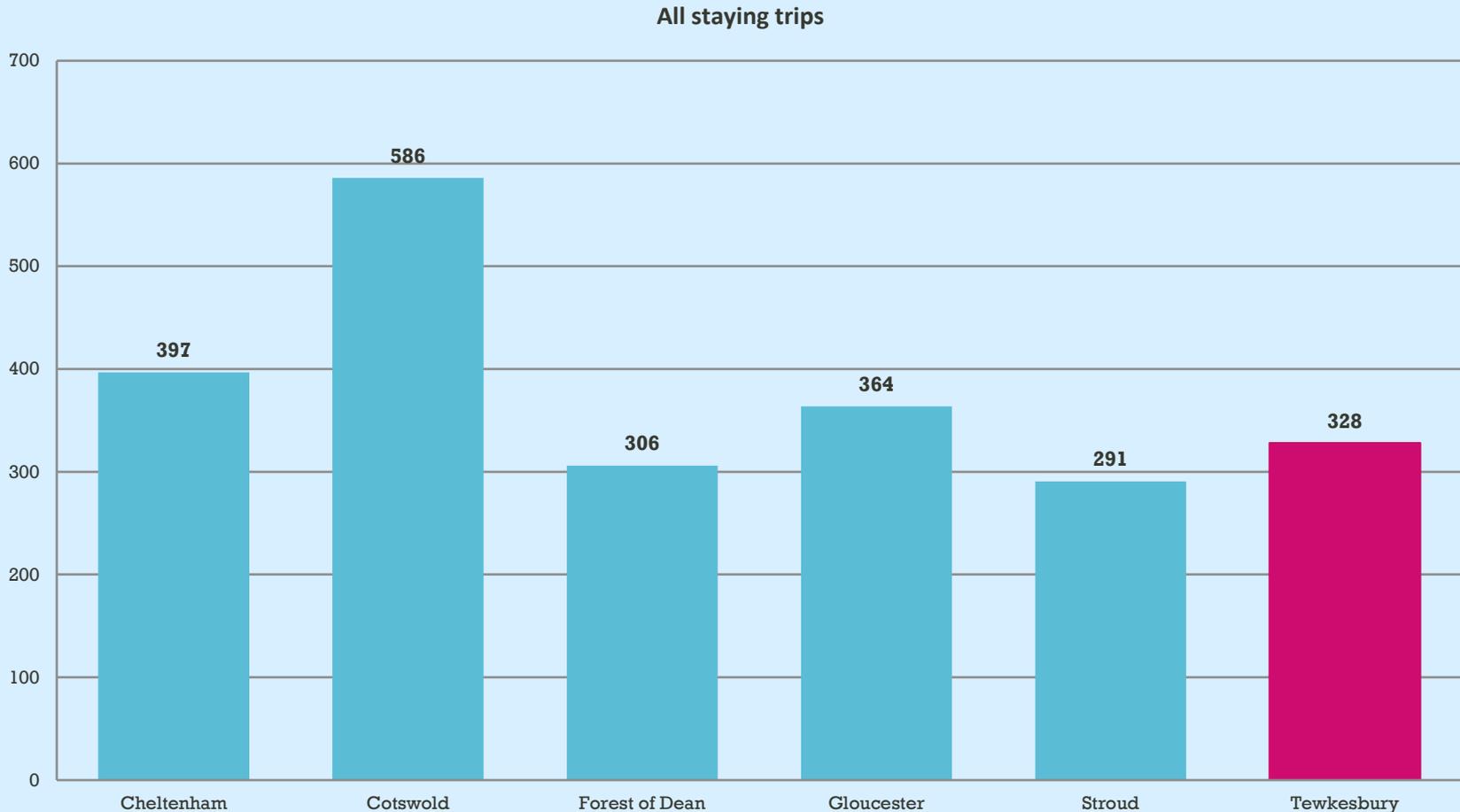


Tourism economy snapshot – pre COVID-19

- Approx. 158 tourism businesses in the Borough – 129 accommodation businesses and 27 attractions
- 2,273 jobs in tourism in the Borough which is 5% of all employment
- Visitors to the Borough spent just under £136 million in 2019
- Impact of tourism £ goes far wider than the traditional tourism
 - Accommodation: £23m
 - Attractions: £16m
 - *Shopping: £32m*
 - *Food & Drink: £41m*



Comparison with the County Districts, 2019 (000's)

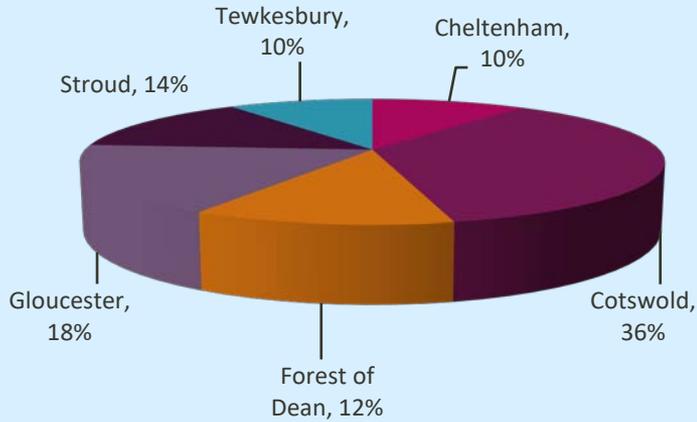


Since 2014 staying trips increased by 19% spending £47m

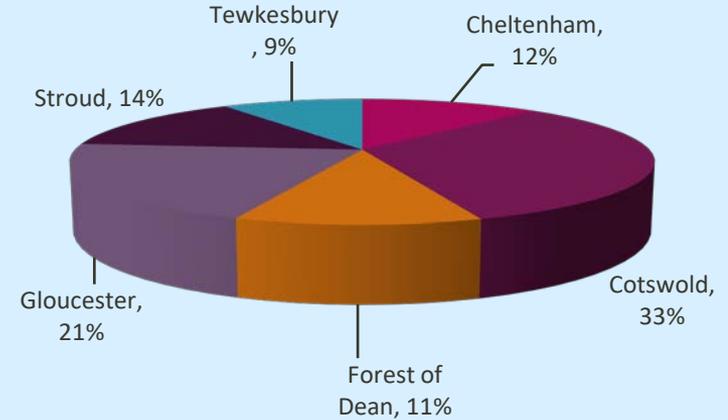


Comparison with the County Districts, 2019 (000's)

All day visits



All day visit spend



Area	Day visits	Day visit spend
Cheltenham	2.0	£81.3
Cotswold	7.0	£221.6
Forest of Dean	2.4	£77.5
Gloucester	3.5	£140.7
Stroud	2.7	£95.8
Tewkesbury	1.9	£63.8

Tewkesbury 1.8m day visitors spending £64m fallen by 5% since 2014



Tourism economy snapshot – today COVID-19

- 11 commercial businesses/charities interviewed
- Mixed picture but all have lost significant income to varying degrees
- Potential closure for some B&Bs and guest houses/smaller hotels. All corporate business and weddings lost
- GWSR 90% loss of income. Tewkesbury Abbey 72% loss of income
- Outdoor activities, self catering, camping and caravanning saw significant footfall July – August for domestic day & staying leisure visitors
- September/October – much quieter – normally older visitors, coach groups or overseas all of whom were not travelling
- ONS reported early Nov: accommodation and food service activities industry had the highest percentage of businesses with no cash reserves, at 6%, compared with 3% across all industries.
- The accommodation and food service activities industry had the highest percentage of businesses with no or low confidence that their businesses would survive the next three months, at 32%.



External assessment looking forward - headlines

- Lockdown and travel restrictions will continue into 2021 – people staying locally –staycation
- Overseas market not set to recover until 2024 – domestic tourism for the next 18 months – rural destinations + self catering
- Consumer demand for digitisation and need for experiences
- County strategy to support tourism – opportunities with Visit Gloucestershire, Cotswolds Tourism - Tourism Zones – Tourism Sector deal
- Consumer focus on being safe from COVID, less travel by public transport and coach – interest in the environment continues
- Going to be competitive market – 95 towns and villages in the wider Cotswolds
- Concern by local residents in attracting visitors bringing in COVID

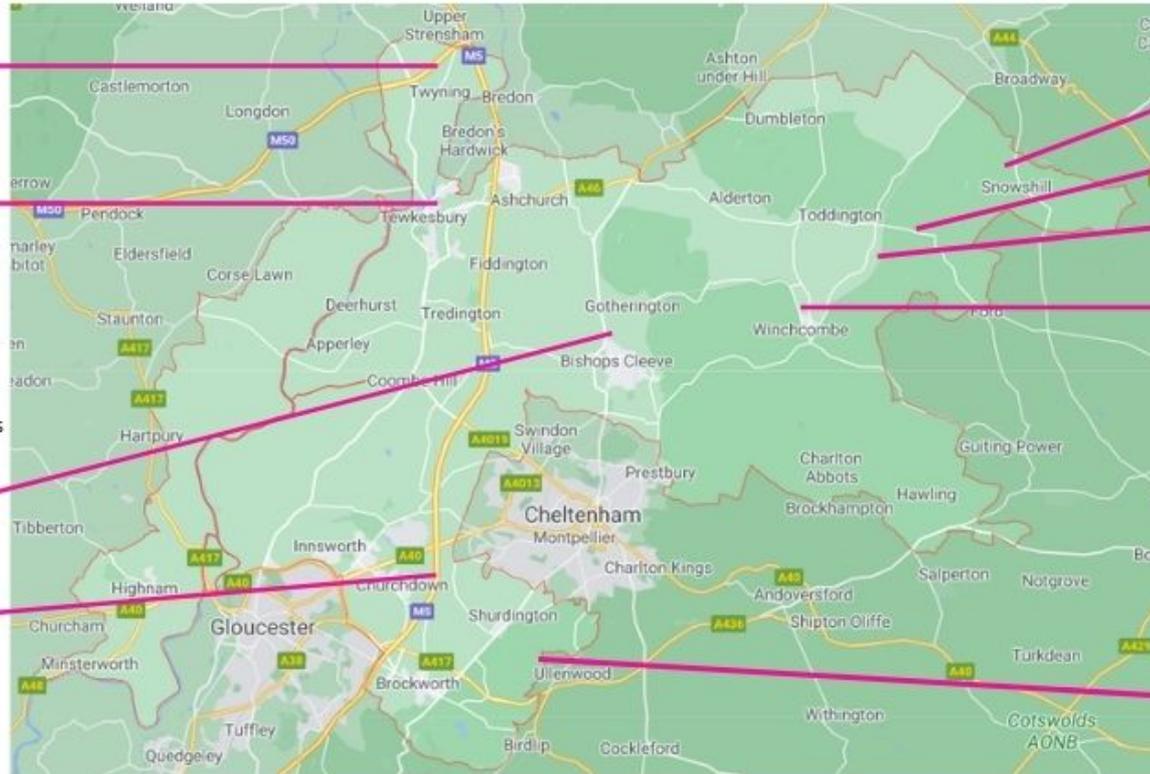


Internal assessment

- Showborough House Sculpture Garden

TEWKESBURY

- Tewkesbury Abbey
- The Severn Ham
- The Roses
- Victoria Pleasure Gardens
- John Moore Museum
- Tewkesbury Museum
- Tewkesbury Battlefield Commemorative Sculptures
- Prescott Hill Climb & Bugatti Museum
- Jet Age Museum



- NT Snowhill Manor

- Stanway House & Fountain
- Hailes Abbey
- Hailes Fruit Farm

WINCHCOMBE

- Winchcombe Folk and Police Museum
- Belas Knap
- Winchcombe Antiques Centre
- Gloucestershire Warwickshire Steam Railway
- Cotswolds Way
- St Peters Church
- Winchcombe Pottery
- Sudeley Castle
- FlyUp 417 Bike Park
- Great Witcombe Roman Villa

- Lots of attractors across the Borough
- Tewkesbury & Winchcombe Towns as hubs – opportunities
- Walking & Cycling – opportunities



Internal assessment - headlines

- Current resource to support tourism is minimal
 - TIC buildings and staff Tewkesbury & Winchcombe
 - shared temporary assistant 30% tourism/70% Growth Hub
 - £7,000 marketing budget – £3,000 to Cotswolds Tourism
- No dedicated staff resource coordinating or leading on visitor economy
- No active public/private group to support or drive tourism in the Borough, or in the Towns
- No cross-working resource to bring together other visitor economy related projects – HAZ, Garden Town, Cultural Consortium...



Internal assessment

- All projects/initiatives including Tewkesbury 2021, Heritage Park, Experience Winchcombe – all **need experienced tourism strategy, marketing and digital support input**
- **Tewkesbury 2021 big year opportunity** to deliver civic pride- positive knock-on effect for promotion of the destination for visitors
- Need for clear distinction of destination brands for Winchcombe and Tewkesbury – to include local culture, retail and hospitality
- Product offer in area is good, however traditional – lacks year-round ‘experiences’, particularly in Tewkesbury
- No marketing plan or resource to proactively grow the visitor economy
- Opportunity to support Place Making – not just tourism. Tewkesbury Borough as a great place to live, work, visit as well as invest



Cheltenham that was... heritage, racing, festivals





Cheltenham – heritage + people + whole culture
So many stories to tell like the Borough of Tewkesbury





Next steps

1. **Survive** - Immediate engagement and support for businesses short-term
 2. **Recover** – support businesses to make as much money as possible to continue trading
 3. **Thrive** – Become stronger more distinct brands within the Cotswolds family with proud engaged communities - **place making**
- **Report with recommendations due in January 2020**