

Early Draft For Discussion

# Tourism Strategy & Programme

## Products & links



# The role of Surrey County Council?

Surrey's profile has been raised by the Olympics and subsequent high profile cycling events such as Ride London-Surrey and the Tour of Britain.

During 2013 we sought the views of key stakeholders about how we can develop the benefits of Tourism to the county.

Questions that we have posed via consultation and engagement include –

Do we need a strategy for Surrey County Council or Surrey as a whole?

Tourism is not a statutory service for local authorities, so why should we support it?

What we are trying to achieve?

# What are we trying to address?

Surrey is not seen as a “destination”. This is demonstrated by –

- Evidence from the UK Travel Survey and International Passenger Survey;
- Historic misconceptions about the suburban commuter belt;
- High-profile media descriptions of the county -
  - Jeremy Clarkson “London’s Patio”;
  - Lonely Planet Guide “uninspiring and dull”;

Tourism is a potential growth area, however the industry is diverse and mainly comprises small businesses, so it often gets ignored when setting economic priorities.

Current tourism promotion infrastructure is not effective in comparison to neighbouring counties, due to limited resources and a proliferation of brands.

Health & Wellbeing inequalities that could be addressed by greater access to visitor attractions – walking, cycling, cultural activities etc.

Sustainability of rural businesses that serve residents e.g. local shops, food and drink producers

# What are we trying to address?

In order to realise the benefits of tourism we need to:

- Set a vision and demonstrate strategic leadership
- Research key target markets and develop a coherent Surrey brand/offer – focused on quality, and relevant themes e.g. walking, cycling, natural environment, culture, heritage, business
- Establish a properly coordinated approach across the county
- Enhance our web presence and avoid duplication
- Develop an appropriate Tourism promotional infrastructure
- Develop a better visitor focus at our destinations – signage, transport, customer care
- Establishing Surrey as a centre for cycling
- Securing economic benefit from major events & cycle tourism

# Why is it a good thing for Surrey Residents

- **Economic growth**
- An improved tourism offer will benefit the local economy, particularly the rural economy as many of our attractions are based within the countryside
- The Olympics effect has raised the profile of Surrey as a cycling and walking destination within easy reach of London and major gateways into the country.
- Further major events such as the Tour of Britain continue to showcase Surrey as a destination and bring tourism (and investment) into the county
- Surrey is ideally located for Business Tourism (e.g. conferences and corporate events) due to its good transport links and substantial business community
- Improved branding and promotion of Surrey will increase footfall to our countryside estates and cultural attractions, and increase the average length of visits to maximise the economic impact of the tourism sector.
- An increase in visitors to Surrey attractions helps to sustain businesses that serve residents e.g. local shops, food and drink producers.
- Tourism provides entry level jobs, training and skills development within the wider hospitality and service sector, and opportunities for apprenticeship and university placement schemes .
  
- **Environmental**
- Sustainable Tourism initiatives have positive impacts upon the natural environment by encouraging greater awareness of rural issues.
- Tourism promotion will enhance the image of Surrey and its iconic landscape and key attractions, to raise awareness of the quality and importance of our natural environment.
- Promotion and training, award and certificated environmental schemes can be used to increase environmental and sustainable practices within the tourism sector.
- Smarter use of internet driven tourism promotion through the use of apps, interactive etc. reduces the need to produce paper copies of guides and publications.
  
- **Social, Health & Wellbeing**
- Promotion of opportunities for residents as well as visitors to enjoy their leisure time within the County through walking and cycling activities will increase health benefits and reducing congestion.
- Promotion of cultural tourism for both mental and physical health benefits.
- The programme will provide an accessible website that links tourism to organisations promoting open spaces for health and wellbeing, including encouraging cycling and walking across the county.
- Accessibility for all to services, recreation and work through and by providing opportunities to volunteer and learn about the benefits of improving access for all through the Tourism network.
- Innovative use of libraries and other key local authority and community facilities as Tourism Information points across the county will encourage residents to take part in activities that contribute to improved health and wellbeing.
- Affordability: promoting the full range of activities available across the county from free access to the countryside activities provided by Surrey County Council to large commercially driven events.
  
- **Partnership Working**
- Maximising benefits by strengthening partnership working between Visit Surrey, SCC, District and Borough councils, the private sector.
- Make tourism promotion in the county financially self sustaining through income generation, operational efficiency and effective partnership working.

# What are the challenges?

- Enthusiasm for an increase in Tourism varies around the county. A consistent “one size fits all” solution is not possible.
- Increased visitor numbers can have an impact on local quality of life. Without appropriate planning, tourism can be the cause of increased traffic congestion, pollution, litter etc.
- Establishing a tourism identity for Surrey, including visits within the county by residents
- Branding has to be very carefully developed to send the right messages about the county and its attractions, and focus on increasing staying visitors rather than more day visitors.
- Existing strengths within the county’s tourism provision could be weakened by new developments originating from SCC that are unsustainable.
- Any investment in Tourism has to be sustainable and produce measurable benefits. Impacts within the sector are notoriously hard to evidence and often rely on proxy indicators.
- Although relatively weak, the current tourism promotion infrastructure is essentially sustainable and any future investment has to be based upon a long term commitment.

# What we know about Tourism

**We have a number of data sources related to tourism:**

## **Surrey Tourism Profiling Report**

- Compiled by Tourism South East Research Unit/Simon Matthews Associates, April 2012.
- Comprehensive audit of the Tourism sector in Surrey pre the Olympics
- Includes the total Tourism “Stock” – accommodations, attractions etc.
- List of “pipeline” projects in development relating to Tourism.
- Identifies strengths and weaknesses, opportunities for development.

## **“Cambridge Model” Volume and Value figures for Surrey**

- staying trips by domestic and overseas staying visitors, with breakdowns for purpose of visit and accommodation used
- the number of nights spent by overseas and domestic visitors
- value and volume of day trips
- direct visitor expenditure by different sector, e.g. accommodation, eating/drinking, shopping, attractions, transport/travel
- impact of associated multiplier and linkage spend
- Indication of the level of direct and indirect employment and induced jobs resulting from tourism.

## **Visit Surrey data**

- Annual report
- Visit Surrey.com monthly web statistics

## **Tourism Priorities for the Local Economic Partnerships**

- Focus within Coast to Capital and Enterprise M3 on Business Tourism

## **National data via Visit Britain/Visit England**

- UK Travel Survey and International Passenger Survey data for 2012 .

# What we do these sources tell us about Tourism?

## Surrey Tourism Profiling Report

- Surrey has 3 distinct geographical tourism 'products'-
  - North Surrey centred around the River Thames from Thames Ditton to Runnymede, connecting to Royal Windsor.
  - South Surrey dominated by the Surrey Hills Area of Outstanding Natural Beauty).
  - The County Town of Guildford - high-quality retail, attractive environment/architecture/arts and cultural offer.
- Potential for Surrey County Council to adopt a more open and responsive policy in dealing with brown sign requests .
- Strategic role in the provision of highways and public transport e.g. ensuring bus routes have better links with attractions.
- Benefits of greater integration of Visit Surrey and relevant SCC websites.

## Cambridge Model Annual Volume and Value figures for Surrey

- Total Overnight trip spend - £515,115,000
- Tourism Day visit spend - £852,564,000
- Total All trips spend - £1,367,679,000
- Total Overseas overnight trips - 610,000
- Total UK overnight trips - 1,452,000
- Total Overnight trips - 2,062,000
- Total Day trips - 26,070,000
- UK visitors accounted for around 67% of all overnight trips, overseas visitors accounted for 33%

## Visit Surrey data

- Significant growth in website hits in recent years (2011 total 369,928, 2012 total 509,275, 2013 est. total 635,000)

## Tourism Priorities for the Coast to Capital LEP

- Developing the international business tourism sector
- Business tourism helping to create our reputation as an international business location
- Making the most of Gatwick - the UK's second largest airport

## Tourism Priorities for the Enterprise M3 LEP

- Developing the "Quality Place" agenda – incorporates consideration of tourism issues.
- Accommodation research
- Identifying growth opportunities for new conference centre.



# What we do currently

**The County Council is involved in a wide range of activities related to tourism. However, current activity is disjointed and uncoordinated. The main areas of work include:**

## **Infrastructure**

- Some financial support to Visit Surrey, the Community Interest Company that acts on behalf of the tourism sector in the county – although the current arrangement will come to an end in 2014
- Officer presence on VS board and working groups
- Officer presence at tourism sector groups e.g. Guildford Conference and Attractions groups.
- Links to the Visit Surrey website from relevant SCC web-pages

## **Direct Provision**

- Surrey's Countryside Estate provides open spaces, walks, riding and cycling routes plus car parks, toilets and cafe facilities
- We own brands such as "Surrey Hills AONB", "Explore Surrey". "Exploring Surrey's Past" , "Our Land"
- Heritage Services encourage Ancestral Tourism via access to family history records, talks, exhibitions and promotion of the rich history of the county, significantly increasing due to publishing records online
- Support for the local museum sector
- Libraries act as Tourist Information Points, providing basic visitor information
- Surrey Arts exhibitions, events attract visitors to the county and the service organises the annual Surrey Artists Open Studios

## **Policy**

- Surrey County Council is responsible for policy decisions affecting tourism "brown" signage, planning of major developments, transport, economic growth

## **Transport**

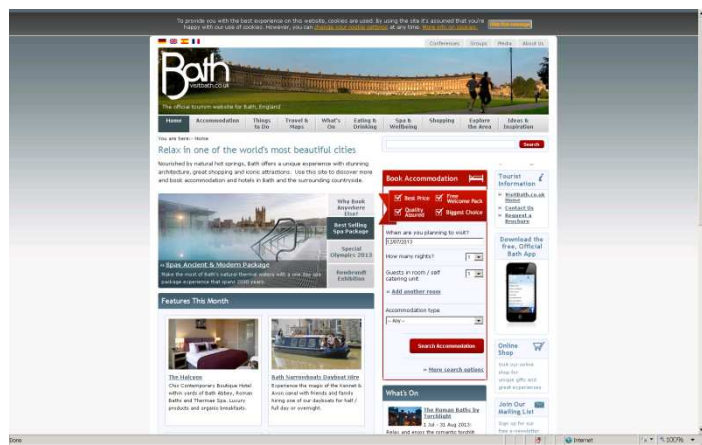
- Role in the provision of transport infrastructure – rail, bus, cycle routes.

## **Information & maps**

- Production of Surrey Cycle and walking maps used by visitors.

# What works – best practice

- In the UK, Bath Tourism Plus (BTP) is widely regarded as one of the very best Destination Management Organisations (DMOs). BTP was established in 2003 as a private and public sector DMO by Bath & North East Somerset Council and the Bath Chamber of Commerce. A recent review identified that only 20% of the company’s funding comes from the public sector. BTP has been recognised for delivering innovative marketing and for managing a successful commercial operation which includes the busiest Tourist Information Centre in the country with 535,000 visitors a year.
- In five years the Visit Bath website has generated £5.8m of income for the accommodation sector and has received 4 million unique visitors. Along with its website and other marketing activity, BTP focuses on PR activity to gain around £1.7m worth of coverage per year for the city and surrounding area and operates a membership scheme, which currently includes 450 commercial members.
- BTP has plans to be the first DMO in the UK to use T-STATS – an original online research and statistics system that will provide key data such as occupancy and rates for the accommodation sector, numbers of visitors and associated spend at attractions, retail footfall and sales data, car parking data and the impact of events and weather on tourism in and around the city.



# Vision: For Surrey to have the most effective and innovative tourism offer in England

## Tourism Strategy Objectives

- O1. Increase the benefits of tourism to the Surrey economy without damaging the quality of life for local residents
- O2. Increase the profile of Surrey as a destination
- O3. Create a distinctive and credible brand that challenges perceptions, stands out from the rest and represents the quality of our tourism product. An identity that would be adopted throughout the sector, targeting aspects likely to grow such as access to the countryside, business and cultural tourism.
- O4. Create a clear, linked web offer – Visit Surrey, Explore Surrey’s Countryside, Exploring Surrey’s Past, Culture/Events
- O5. Seek a more viable, creative and focussed public /private partnership business model for Visit Surrey
- O6. Introduce Policy changes/harmonization to create a better environment for Tourism to flourish – planning, film and TV locations, brown signs, reducing red tape etc.
- O7. Support the establishment of Surrey as a Centre for Cycling Tourism.
- O8. Improve the visitor focus of our main destinations e.g. co-ordinated parking/signage schemes, better public transport links to destinations and customer service.
- O9. Support the development of Business Tourism in Surrey.

# Guiding Principles

- **Economic**
- Aspire to be a leader in the new internet driven tourism sector through the use of apps, interactive maps and the creation of a “state of the art” website that links all related tourism websites in one over-arching presence.
- Capitalise on the Olympic Legacy effect of the raised profile of Surrey as a cycling and walking destination within easy reach of London and major gateways into the country.
- Improve the branding and promotion of Surrey to increase footfall to our countryside estates and cultural attractions, and increase the average length of visits to maximise the economic impact of the tourism sector.
- Promote and support the local economy, e.g. attractions, local food and drink, local producers.
- Make tourism promotion financially self sustaining through income generation, operational efficiency and effective partnership working.
- Support training and skills development across the tourism sector to ensure that levels of Customer Service are amongst the highest in the country.
- 
- **Environmental**
- Support sustainable Tourism initiatives that have positive impacts upon the natural environment.
- Minimise the negative impacts of Tourism to protect the environment and local quality of life.,
- Enhance the image of Surrey, its iconic landscape and key attractions, to raise awareness of the quality and importance of our natural environment.
- Promote, through training, award schemes and certificated schemes to increase environmental and sustainable practices within the tourism sector.
- **Social**
- Promote opportunities for residents to enjoy leisure time through walking and cycling activities; maximising health benefits and reducing congestion.
- To provide an accessible website that links organisations promoting open spaces for health and wellbeing, including encouraging cycling and walking.
- Accessibility for all to services, recreation and work through promotion of apprenticeship schemes, university placement schemes and by providing opportunities to volunteer and learn about the benefits of improving access for all through the Tourism network.
- Innovative use of libraries and other key local authority and community facilities as Tourism Information points across the county.
- Affordability: promoting the full range of activities available across the county from free access to the countryside activities provided by Surrey County Council to large commercially driven events.

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Fit with Corporate Priorities

Health & well-being

*Physical activity  
Prevention*

Encouraging walking, cycling and cultural activities

Rural Strategy

*Rural economy*

Increased access and awareness, promotion of local producers

Surrey Tourism Strategy

Branding  
Web Presence  
Infrastructure

Economic Growth

*Productivity  
Business sector  
Rural economy*

Promotion of Major events  
Cycle tourism

Cycling Strategy

*Cycle tourism*

# Issues and resolution

| Issue   | Resolution   |
|---|--|
| Low awareness of Surrey as a destination          | Improved branding and web presence                   |
| Duplication – promotion, publicity                | Improved promotional infrastructure                  |
| Duplication - roles                               | New sustainable model for Visit Surrey               |
| Under resourced tourism promotion                 | New sustainable model for Visit Surrey               |
| Conflicting drivers – conservation v growth areas | Clear policies and application of guiding principles |
|   |  |