

Report subject	Tourism Strategy
Meeting date	8 March 2023
Status	Public Report
Executive summary	<p>This report brings forward for adoption the first 'whole place' Tourism Strategy for the BCP region. Developed in collaboration with the Destination Management Board it sets out a clear set of priority actions and outcomes for the development of the tourism offer over the next 5 years.</p> <p>The Tourism Strategy responds to significant changes across the visitor economy in recent years, accelerated by the impacts of Brexit, the Pandemic and the challenges around cost of living and inflation.</p> <p>The strategy sets out a new approach to delivery by the tourism industry and enabled by the Council. It establishes a strong vision and actions to deliver long term growth in a core industry with an international award-winning reputation and demonstrates the Council's ongoing commitment to tourism. Finally, the strategy directly links with the Culture Strategy developed by the Cultural Compact with a number of cross-cutting actions. Both strategies are being brought forward for adoption by Cabinet at the same time.</p>
Recommendations	<p>It is RECOMMENDED that:</p> <p>(a) Cabinet approve the adoption of the Tourism Strategy</p> <p>(b) Delegate to relevant Director for the Destination Service the further collaboration, development and implementation of a detailed delivery plan with the Destination Management Board</p>
Reason for recommendations	<p>Supporting the Big Plan:</p> <ul style="list-style-type: none"> ○ Supporting investment in Iconic Cityscape: Bournemouth International Centre reinvestment; Bournemouth Arc ○ Investment in the Seafront programme ○ Poole centre rejuvenation ○ Infrastructure: Transforming Travel & Smart Places

programmes

Bournemouth Airport

Supporting the Corporate Strategy:

- by working toward a Sustainable Environment: Ensure sustainability underpins all of our policies; Protect and enhance our outstanding environment; Support developing an eco-friendly and active transport network; Maximise access to our high-quality parks and open spaces
- Working toward a Dynamic Place: Revitalise and reinvent our high streets and local centres; Create a sustainable, vibrant and inclusive economy; Increase productivity through skills development; supporting development sustainable infrastructure; supporting creation of a 21st century digital infrastructure
- Working toward Connected Communities: strengthen the cultural identity of our towns and places;
- Working toward Brighter Futures: Enable access to high quality education

Supporting transformation of the tourism sector by reframing the Council's role and support for Tourism, acting increasingly as an enabler rather than a deliverer of services, and develop a more commercial approach to activities undertaken directly by the Council.

Portfolio Holder(s):	Beverley Dunlop, Cabinet Member for Tourism, Culture & Vibrant Places
Corporate Director	Amanda Barrie
Report Authors	Andrew Emery
Wards	Council-wide
Classification	For Recommendation

Background

1. The Bournemouth, Christchurch and Poole area has long been associated as one of the premier coastal visitor destinations in the UK, underpinned by an award winning natural environment, Blue Flag beaches and a wealth of local and regional visitor attractions. Featuring the largest stock of visitor accommodation on the south coast a strong conference and international English language education sector and good transport links to the regions and London, it benefits from a catchment audience of over 23m.
2. The tourism sector is a key contributor to the local economy, attracting over 8.8m day visitors and 1m staying visitors to the BCP area in 2021, the most recent year for which consistent data is available. These visitors spent over £570m locally, supporting 12,000 jobs and generating over £1.3bn in business activity per year.
3. The sector has been undergoing rapid change in recent years, fuelled by rising competition, changing audience expectations, demographic changes and the move away from a highly seasonal summer focused visitor economy to one that is increasingly attracting new audiences year-round. Social media and digital technology has rapidly advanced the way visitors engage, book activities and share experiences. More recently, the impacts of Brexit on the hospitality sector has been significant due to its historic reliance on a seasonal European workforce. The pandemic and more recent rises in cost of energy, inflation and cost of living have further hindered recovery and growth, hitting the spending power of potential visitors and operating margins and capacity for reinvestment by the industry.
4. Whilst the sector has displayed a rapid recovery from the initial impacts of the Covid pandemic and footfall, spend and employment saw further recovery in 2022 and some net growth, overall recovery to 2019 levels of economic activity has yet to be achieved.
5. The Council is a major partner in the tourism sector, directly responsible for managing the seafront, Poole Quay, parks and countryside sites which form the backbone of the tourism destination offer. And it has a key role overseeing the contracted operations of the Bournemouth Pavilion and BIC leisure venues. The Council also directly operates other key visitor attractions across the seafront as well as a series of museums and heritage sites including Poole Museum, Highcliffe Castle and the Russell Cotes Art Gallery and Museum. The tourism team are also responsible for the direct delivery of major events and festivals

such as the Air Festival and Christmas Tree Wonderland as well as administering and safety checking commercial and community events of which there are over 1,000 a year. These operations deliver a significant financial surplus each year towards the Council's Medium Term Financial Plan.

6. The Council is not the only major player within the tourism sector. The BCP Destination Management Board (DMB) exists to bring together key stakeholders from across the sector, including the cultural sector, to provide a steer and inform the development and direction of activities including destination marketing and events. Currently, though, the DMB is not constituted to deliver activities directly itself. The Council's Tourism team acts as a secretariat for the DMB. Other key stakeholders include the four Business Improvement Districts, who have some delivery overlap in marketing activity and the BH Area Hospitality Association who represent the interests of the hotel sector. The conference and language school sectors are also represented here.

The case for change

7. Set against this background of recent change, there is a need to refresh the existing local tourism strategies. These were last updated in 2017, only covered Bournemouth and Poole and pre-date the formation of BCP Council. No tourism strategy exists for Christchurch.
8. Historically, the tourism strategy has been wholly owned by the Council but this new strategy will see a significant shift toward an industry led and owned approach, with the Council continuing to be a significant stakeholder. Increasingly, though, the Council's role will shift toward enabling and supporting rather than delivering.
9. This change is being driven in part by the changing structure of destination management across England coming out of the Government's response to the recent DuBois review.¹ Visit England will be inviting applications for Tier 2 organisations which is likely to mean forming a county-wide Local Visitor Economy Partnership (LVEP) destination management organisation. This organisation will be the formal link to government and must be aligned to government objectives. It will also be a gateway for any future funding bids for the area to Arts Council, Heritage Lottery Fund etc. This will require reconstitution of the current Destination Management Board and realigning its relationship as a Tier 3 DMO in relation to the Tier 2 LVEP.
10. The Council remains highly committed to the tourism sector reflected in key priorities set out in the Big Plan and Corporate Strategy. In order to further unlock potential and support continued recovery there is a recognition for the need to supporting the talent, entrepreneurship and vision of the industry to become more competitive and deliver key economic growth.

Tourism Strategy 2023 - 2027

11. Reflecting on this rapidly changing landscape, the new Tourism Strategy sets out a clear set of actions and outcomes for the sector to be delivered over the next 5 years. The Strategy is owned by the Destination Management Board, with the Council as a partner and key stakeholder.

¹ [DuBois review](#)

12. The vision seeks to establish one of the best coastal places in the world to visit, work and invest in. And this will be achieved via a series of core and development goals designed to establish a sustainable, year-round tourism economy.
13. The Tourism Strategy is underpinned by extensive research and consultation. Research draws on independent industry studies into existing and future growth leisure markets, the conference sector and high streets. It is also informed by the BCP Seafront Strategy adopted by the Council in April 2022.
14. Closely aligned and informing the Tourism Strategy is the Cultural Strategy, developed by the Cultural Compact which is being brought forward for adoption at the same time.
15. Other key influencing strategies, aside from the Big Plan and Corporate Plan include the Climate and Ecological Emergency Action Plan, the High Streets and District Centres Strategy; Cycle and Walking Infrastructure Plan; Economic Development Strategy; Health & Wellbeing Strategy; the Local Transport Plan and the BCP Future Stories and Eventful City consultations reports.
16. Commissioned by the Destination Management Board, the Tourism Strategy has been drafted by the Council's Destination Development team and was consulted and developed with DMB members during the Autumn of 2022. Further engagement with the Portfolio Holder for Tourism and Members took place on the 13th and 14th December, with final amends in early January.

Options Appraisal

17. Option 1 Do nothing: At a time of significant change to the tourism sector, existing strategies are outdated and do not respond to the current challenges or fully prioritise the needs of the of the industry and its visitor audiences. This will result in a lack of direction, co-ordination of effort and poor investment decisions. These impacts will be significant for the Council as a key stakeholder, investor and operator across the visitor economy.
18. Option 2 discounted: A council led tourism strategy. With the Council's focus on delivering its transformation agenda to meet the medium-term financial plan, it is no longer viable for the Local Authority to be the sole responsible partner for delivery of events, destination marketing and other tourism activities. A true partnership approach requires cross sector buy-in and ownership of the strategy, as the Council moves toward a more enabling role.
19. Option 3 recommended: An industry led strategy, backed by the Destination Management Board with the Council as enabling partner. The action to establish a Tourism Strategy is underpinned by the commitment in the Corporate Strategy to create a sustainable, vibrant and inclusive economy under the Dynamic Places strand.

Summary of financial implications

20. There are no financial implications for the Council arising from the adoption of the Tourism Strategy, which will be owned by the Destination Management Board.

Summary of legal implications

21. There are no legal implications for the Council from the adoption of the Tourism Strategy, which will be owned by the Destination Management Board

Summary of human resources implications

22. There are no human resources implications from the adoption of the Tourism Strategy, which will be owned by the Destination Management Board

Summary of sustainability impact

23. The drive toward greater environmental sustainability within the cultural sector is a key action within the Tourism Strategy. This will be achieved through delivery of key priorities environmental pathfinder projects within which the cultural and creative sectors will be supported to collaborate with other key economic sectors to support the drive to net zero.

Summary of public health implications

24. The strategy supports an economic and environmentally sustainable approach to tourism growth and investment. Historically, the tourism economy has brought investment focus to parks, open spaces, the seafront promenade public realm, piers, attractions and amenities. These have delivered significant social, wellbeing and health benefits for local residents. Continued investment to attract visitors and build on the destinations strengths will ensure these amenities are maintained and improved, providing additional benefits for residents in the future.

Summary of equality implications

25. An EIA screening document has been completed for review by the EIA panel. Improving access and inclusivity around tourism services is highlighted as a core cross-cutting goal within the strategy. Key actions include: an action to develop hospitality industry recruitment and retention including proactive diversity of representation of our community. Action to develop an events strategy, linking to a key action within the Cultural Strategy to promote greater diversity, inclusivity and representation of our communities to encourage greater social cohesion and place making. Efforts here are particularly focused on supporting the talent and skills development for the next generation of event organisers and programmers to embed greater cultural diversity within our community event programming. A further key action around attracting investment in accessible infrastructure and visitor services, linking to key policies and action planning within Highways and Transport teams to improve public and sustainable transport connectivity with key tourism sites. Finally, a key area for visitor audience development revolves around marketing and promoting accessible tourism, identified as a growth market by Visit Britain and embraced by a number of BCP area hospitality businesses.

Summary of risk assessment

26. Key risks identified by the strategy revolve around the Council's MTFP and budget setting for 2023/24 and the impacts this may have on its traditional role funding events and destination marketing. These risks are fully acknowledged within the strategy and reflect a national picture where Local Government increasingly plays an enabling role in partnership with the tourism industry to deliver key activities and outcomes for the sector. The Strategy sets out in detail this changing relationship

and the role that the Destination Management Board will evolve to take on a greater share of delivery of activities in the future.

Background papers

Bournemouth, Christchurch and Poole: Working together to deliver a great destination.
Tourism Strategy 2023 – 27 attached as an appendix to this report