B&NES Council
SouthWest Tourism
Bath Tourism Plus

October 2007

B&NES DESTINATION MANAGEMENT PLAN

FINAL REPORT

B&NES DESTINATION MANAGEMENT PLAN

DRAFT FINAL REPORT

Contents

SUMMARY

What this plan is about

This report is a Destination Management Plan (DMP) for Bath and the surrounding area. Its purpose is to ensure that this area continues to flourish as a successful leading visitor destination in the years to come and continues to derive benefit from tourism.

The Destination Management Plan looks at all aspects of the visitor experience, identifies priorities for improvement in marketing, the tourism product and supporting infrastructure, and suggests how all the parties involved can work together to deliver the required outcome. The DMP also relates the visitor economy to the wider aspirations for Bath.

In producing the plan we have worked closely with B&NES Council officers, Bath Tourism Plus and South West Tourism. We have consulted a wide range of organisations and individuals in Bath, held two workshops to discuss issues, undertaken a survey of tourism enterprises and carried out some new market research. We have also reviewed relevant statistics, research reports and strategy documents. This summary sets out the main conclusions and recommendations but more detail and analysis can be found in the main report.

Where Bath is now

Bath is a mature visitor destination with a long history and tradition of tourism stretching back over 2000 years – it is probably the oldest continually active visitor destination in Britain! It attracts an estimated 3/4m staying visitors a year, a third of whom come from overseas, and some 3m day visits. These visitors inject £150m into the local economy and support 8,200 jobs.

Bath is a very special place. It has Britain's only thermal spring and is designated as a World Heritage Site with an extensive Georgian core and strong relationship to the landscape beyond. The key attractions lie in its heritage and architecture, shopping, food, culture, festivals and the revival of the spa. The rural hinterland, within and beyond B&NES, adds a further dimension to this and attracts visitors in its own right. Bath has a good quality hotel and accommodation stock achieving high levels of occupancy and earnings. All this makes for a very potent combination where the whole is more than the sum of the parts.

Despite being a mature destination Bath is still a major player in tourism with a strong brand. It benefits from high levels of awareness, both nationally and internationally, continues to draw large numbers of visitors and delivers high levels of satisfaction. It commonly features in the top ten UK cities and has one of the UK's top visitor attractions in the Roman Baths.

Tourism plays an important role in terms of the Bath economy, generating employment, underpinning other economic sectors and supporting a more varied range of facilities than the local population could support alone.

Despite these undoubted strengths, however, Bath also has some weaknesses which may threaten its future viability as a destination.

- Tourism is static and may indeed be contracting
- It is over dependent on holiday tourism
- A lack of accommodation capacity constrains and inhibits growth
- It is expensive and losing ground in terms of value for money
- Planning constraints mean the product is difficult to change and refresh
- Some parts of the town are looking a bit ragged and run down, particularly around the gateway areas
- The quality of the public realm and ease of movement in and around the city falls below the standard one might expect from a place of this significance
- There is a lack of co-ordination in respect of destination management

In short, BATH IS GOOD BUT IT COULD BE BETTER!

Deciding on a future direction

Change is inevitable. Bath can't stand simply stand still even if it wants to because the world is changing around it and there are big changes in the offing locally. Plans for the visitor economy need to be set in this wider context. Some key considerations which need to be taken into account are highlighted below:

- ***Helping to realise the Bath Vision.*** Bath is on the brink of some significant changes. There are external pressures to accommodate growth and some major development sites coming on stream which will open new opportunities and change the shape and feel of the city centre for years to come. A consensus about how best to capitalise on these changes is emerging and is set out in the Future for Bath Vision. Destination management is a key component of this.

- ***Working towards a sustainable future.*** The concept of sustainability runs through the regional tourism strategy, spatial strategy and economic strategy. It is assuming greater prominence and urgency with the growing awareness of climate change and this must also shape the approach to tourism. It has potential to confer a clear market advantage as discerning consumers become more environmentally discriminating. This is not about discouraging tourism but does mean trying to steer the visitor economy into a more sustainable shape and structure. It means providing a quality experience for visitors, a commercially viable industry, acceptable to the local community without degrading the environment.

- ***Adapting to a changing market needs.*** Tourism is essentially market driven and if it is to thrive it will need to respond to external changes and changing consumer tastes. Increased competition and the prospects for tourism growth mean that it will be harder work to grow tourism in future. Simply retaining market share will require investment and a willingness to embrace change. Standing still is likely to be a recipe for stagnation and long term decline. There is a danger that Bath's relative success and prosperity encourages complacency resulting in a failure to look ahead and plan for the future.

- ***Deciding what Bath wants from tourism?*** It is important to consider what Bath as a 'community' wants from tourism as this may determine the size and nature of the industry we are aiming for. Possible objectives include - developing a thriving economic sector, projecting a positive image of Bath, enhancing the quality of life, and supporting and maintaining the urban fabric and character. The community may also decide however that it wishes to control and managing tourism to prevent it dominating the City

A strategy for tourism

In the light of the above considerations we propose the following approach to tourism in Bath and the surrounding area.

The aim

To develop a viable and sustainable visitor economy which continues to make an important contribution to the economic vitality of Bath and the surrounding area, enhances its image and standing, is in harmony with its unique environment, and adds to the quality of life for its residents.

Where we want to be

A beautiful city, widely known, highly regarded and in the premier league of historic European cities.. A place which people aspire to visit not only for its architecture and its historical interest but because it is simply a great place in which to spend time. A vibrant, distinctive place with a strong independent and creative spirit reflected in the range and variety of its shops, restaurants, cultural life, , places to stay and access to beautiful countryside. A place which has a life and culture beyond tourism, which welcomes visitors but doesn't allow them to dominate, and where exploring and moving around the city is a delightful experience. A place that inspires people to come back to time and time again, always with something fresh to discover.

Key principles

The approach to tourism in Bath should be governed by the following key principles. These will determine the priorities and emphasis and underpin all the various initiatives proposed.

- Aim high – Bath should be World class
- Focus on value not volume
- Position Bath as offering something special
- Freshen the offer rather than dramatic change
- Link Bath to its hinterland to add depth
- Embrace sustainability
- Adopt an integrated approach to delivery

Market positioning

We envisage that the market mix will remain broadly similar to now. Within this the aim should be to increase length of stay and spend, extend the season (although Bath enjoys a fairly even spread of visitors) and continue to deliver high levels of visitor satisfaction. Day visitors are an important market segment, vital for underpinning visitor attractions, retail and catering sectors. The aim should be to better manage the impact of these and encourage longer stays. Bath has a relatively old visitor profile. This is an important segment with high levels of disposable income and leisure time. Nevertheless, it will be important to ensure that younger age groups are introduced to the attractions of Bath to ensure replacement. Pitching marketing messages at a younger age group will be unlikely to deter the older age groups.

The ideal visitor for Bath is someone who will enjoy and benefit from the special experience that Bath has to offer. Targeting these visitors is more likely to result in satisfied and appreciative customers.

PRIMARY MARKETS	
Who are they	***What are they looking for***
• Domestic short break takers, ABC1, ranging from pre-family couples/friends t[o] active • retired, living within a 2 hour catchment	Short holidays weekend and mid-week, general interest, range of things to do and see in an attractive environment.
• Overseas visitors from N America and • Europe, couples/friends, aged 30-70	Short stays and stopovers using Bath as a stop o[n] a UK tour or as a base to explore southern England. General sightseeing
• Business and conference delegates	Corporate and small associations from 2 hour catchment/ M4 corridor, small meetings in a distinctive setting.
• Independent day visitors of all ages, primarily from within 1 hr catchment.	Bath for shopping, general sightseeing, entertainment as day/ half day from home or holiday address.
SECONDARY MARKETS *	
• Domestic longer holidays up to a weeks duration. Families and couples in self catering accommodation. • Organised group visits and coach tours. • Independently organised small group visits including extended families, hen parties, re-unions etc often based in self catering. • Themed short break packages eg spa breaks, rugby breaks, cookery courses. • Visits stimulated by events and festivals. • B&NES residents and their visiting friends and families. • University students and their friends and families	

*Secondary markets are less important in terms of size or value but are important for particular sectors of the industry

Indicative targets

Measure	**2007-2016**
Staying visits	+ 10%
Staying visit spend (real terms)	+ 20%
Staying nights	+15%
Day visits	+5%
Day visit spend (real terms)	+10%

Priorities for action

In order to deliver the above strategy we have identified a range of actions grouped under the following broad themes. These focus on the key issues that need to be addressed and the most significant areas, and should not be seen as excluding other areas of activity currently undertaken.

1. Marketing and communication
2. Tourism product
3. Environment and infrastructure
4. Management and leadership

Theme 1 Marketing & communication
Bath must continue to actively market itself if it is to maintain its position in the face of increasing competition and changing market requirements. More resources will be needed if it is to move ahead and develop new areas of activity. It makes sense to continue to lead with the powerful and recognised brand of Bath which is a generator of tourism for a wide hinterland although there is a synergy between Bath and the surrounding area which can be exploited. Marketing messages and priorities need to be reviewed to ensure that Bath is presenting itself in the best light and attracting a mix of tourism which is sustainable in the longer term, taps into new areas of interest and meets the area's wider aspirations. The emphasis should be on increasing value rather than volume and ensuring that Bath remains an aspirational place to visit.
Priority areas
• <u>Revisiting the Bath brand</u> to ensure that Bath is projecting a consistent and sharper image to the market place. • <u>Keeping Bath on people's radar</u> as a desirable place to visit by maintaining a high profile in the media. • Reviewing the <u>market emphasis</u> to ensure that Bath maintains a robust mix of tourism markets. • Placing more emphasis generating <u>off-peak business</u>. • Seeking ways of <u>enriching the visit</u> and appeal by publicising more off-beat and quirky aspects of Bath
Action points
Ø Initiate a process to review Bath brand with relevant stakeholders Ø Adjust marketing messages in the light of the above Ø Strengthen PR activity to generate continuing media coverage Ø Commission stronger and more striking visual images for use in marketing Ø Identify market segments with growth potential Ø Develop campaigns to boost off-peak business Ø Work with partners to make more of hidden gems Ø Make case for, and explore ways, of attracting additional funding

Theme 2 The tourism product
The aim is to ensure that Bath has the right mix of attractions and supporting facilities in place to meet market needs, keep pace with changing tastes and more than hold its own against competing destinations. The main priority is to refresh and make more of Bath's existing offer rather than add major new attractions although there is a case for some additional facilities on the hotel and conference front.
Priority areas
• Increasing accommodation capacity and choice. There is a need for additional hotel accommodation in the City. • Finding ways to make the history of Bath come alive for visitors to enrich the visit and strengthen Baths unique appeal. • Creating a lively, living City not a museum. A vibrant, creative place with a place with a real buzz. • Making more of festivals and events to reinforce the image of Bath and stimulate visits. • Exploring the case for a new exciting venue to act as a beacon for conferences and cultural events. • Strengthening the rural product to add to the range of things to do around Bath and spread the benefits of tourism ore widely
Action points
Ø Commission a hotel demand study. Ø Ensure visitor economy priorities are reflected in the LDF. Ø Initiate discussions with hotel developers. Ø Develop Bath history overview and more integrated approach by museums. Ø Explore the use of new technology to interpret Bath's history. Ø Encourage museums to review and update their presentation. Ø Explore how management and planning policies might foster the retention of a lively independent sector. Ø Encourage the development of an appropriate casino development. Ø Support the redevelopment and retention of Bath Rugby in the city centre. Ø Draw up a major events strategy. Ø Further investigation of medium scale cultural/conference venues elsewhere. Ø Develop more itineraries to attract visitors into the rural areas Ø Identify opportunities for small scale attractions and accommodation in the countryside. Ø

Theme 3 Infrastructure and environment
The aim is to make the experience of visiting Bath as enjoyable, distinctive and memorable as possible and of the standard commensurate with its standing as one of Europe's premier historic sites. This means improving access, creating a good first impression at gateways, making it easy to find your way around and creating an environment and ambience which enhances the experience of visiting Bath.
Priority areas
• Making it easier to get in and out of Bath and encouraging the use of public transport. • Providing better signage and information within the City to enable people to orientate themselves and easily find their way around. • Improving the look and feel of the City centre and creating a safe, pleasant and enjoyable place in which to spend time.
Action points
Ø Draw up a visitor parking and signage strategy Ø Adopt a pro-active coach management policy Ø Provide public transport information for visitors

- Ø Provide orientation material at points of entry
- Ø Design and implement a wayfinding scheme
- Ø Develop information training for front line staff
- Ø Encourage closer working between information centres
- Ø Implement findings of the public realm and movement study

Theme 4 Management and Leadership
Tourism needs to be actively managed and planned for if it is to prosper and achieve the wider benefits for the community at large. This means putting in place the right organisational structures to market and manage tourism which have the support and involvement of both the private and public sectors. Tourism needs to be related to the bigger picture, an integral part of the plans for Bath's future. It is important to ensure that it is sustainable in the widest sense ie. commercially viable, providing a quality experience for the visitor, accepted by the local community and not adversely affecting the environment. Research and evaluation should underpin future action.
Priority areas
• Getting the right <u>organisational structures</u> in place to market and manage tourism. • Securing <u>additional sources of funding</u> to implement the strategy. • Putting <u>sustainability</u> centre stage and ensuring that all activities are judged against this criterion. • Monitoring and evaluating activity and adopting evidence <u>based approach</u>.
Action points
Ø Establish new arrangements for city centre management Ø Continue to support the work of BTP Ø Establish a new organisation capable of attracting additional funding Ø Explore the feasibility of establishing a BID Ø Identify 'sustainability champions' within BTP Ø Promote sustainability to the industry including take up of Green Tourism Business Scheme. Ø Prepare annual tourism sustainability report Ø Continue to measure the impact, volume and value of tourism in Bath Ø Continue to measure occupancy and attraction visit trends Ø Continue to measure visitor satisfaction and attitudes Ø Collate and disseminate market intelligence Ø Benchmark Bath against other destinations

1. INTRODUCTION

In March 2007 The Tourism Company was commissioned to draw up a Destination Management Plan (DMP) for Bath and North East Somerset (B&NES) working closely with B&NES Council and Bath Tourism Plus (BTP) and South West Tourism (SWT) who had funded the study.

The report covers Bath and the surrounding area, particularly areas within North and West Wiltshire which have a strong affinity with Bath. It is a plan looking ahead over the next ten years although it will need to be reviewed and adjusted over that period.

1.1 What is a destination management plan?

The DMP is primarily concerned with ensuring that Bath and the surrounding area continues to flourish as a tourism destination. It is not a tourism marketing plan although it does touch on marketing issues. Its rationale lies in a recognition that it is the quality of the <u>total</u> visitor experience that makes for a successful visitor destination - the welcome afforded to visitors, good service and well trained staff, ease of access, quality of accommodation, appeal of attractions, ambience and character, safety, maintenance of environment and supporting infrastructure etc. Delivering this requires the active engagement and co-operation of a whole range of individuals, stakeholders and agencies and the DMP is about establishing an agreed framework for this.

The DMP touches on:

- The marketing and positioning of Bath and the relationship of the city to the surrounding area
- The nature of the current tourism product and priorities for improvement.
- The improvement of the environment, public realm and supporting infrastructure
- Delivery and management mechanisms

This is not something that can be done in isolation by one agency acting alone. The DMP needs to link to other initiatives underway and also win the support of the various stakeholders involved including the tourism industry and the local community..

1.2 What we have we done

The report is based on information drawn from the following sources:

- Face to face and telephone discussion with key stakeholders in the tourism sector, local authority and other agencies
- Analysis and review of available statistics and research on visitors to Bath and the surrounding area
- Review of relevant strategies and policy papers pertaining to the area
- A questionnaire survey of over 200 tourism enterprises in the area
- A review of wider tourism trends and influences.

- Market research into the behaviour and perceptions of people who don't visit Bath.
- Feedback from two workshops with different groups of stakeholders discussing tourism issues, sustainability and the branding of Bath

We would like to thank all those who took part in the above consultations and who generously contributed their time and ideas.

1.3 The structure of the report

The report is structured as follows:

Chapters 2-4 review what is known about the current state of tourism in Bath and the surrounding area.

Chapter 5 looks at some of the factors which will influence what happens in the future

Chapter 6 draws out conclusions from the above analysis and recommends an approach and strategy for the future.

Chapter 7 sets out some specific recommendations for priorities and action and responsibilities for taking this forward.

2. THE STRATEGIC CONTEXT

The visitor economy doesn't exist in isolation. This section reviews some of the current policies and strategic framework which will affect tourism and set the context within which action has to be taken. Some of the key documents are highlighted below.

2.1 Regional and sub-regional policies

The **Regional Economic Strategy** (2006-2015) highlights tourism as one of 8 priority sectors of the economy. It stresses the important role of towns and cities in driving growth in the region "*which means increasing investment in infrastructure, culture and regeneration"*. The West of England is seen as having *"a lead role as a city region of international, national and regional significance".* Sustainability is seen as an essential policy component.

The draft **Regional Spatial Strategy** is based on an assumption of continuing growth which will largely be focused on 21 Strategically Significant Towns and Cities of which Bath is one. Bath is expected to accommodate 16-20k additional jobs and 15.5k new homes (within B&NES) by 2026. Bath is highlighted as being of international significance owing to its WHS status and the focus should be on protecting and enhancing the environment whilst enabling the city to continue its economic, social and cultural development. Tourism is recognised as being important to the regional economy. The importance of making tourism more sustainable is highlighted and towns and cities should develop action plans for tourism, identify investment opportunities and infrastructure requirements.

The regional tourism strategy **Towards 2015** produced by SWT identifies 3 strategic aims driving up quality, delivering sustainable tourism and establishing better and more efficient arrangements for delivering tourism at the destination level. It proposes establishing Destination Management Organisations of which Bath Tourism Plus is an example.

The **West of England Tourism Development Plan** (2006) sets out tourism priorities for the sub-region including Bristol, Bath, North Somerset and South Gloucestershire. This proposes that destination marketing should be led by the DMOs but that they should continue to work closely together and it identifies some priorities for joint working. The emphasis is on modest growth with continuing investment to maintain competitiveness and improve quality. Priority should be given to investment which brings benefits to local residents as well as visitors.

The **Joint Local Transport Plan** (2006-2011) includes a bid (the Bath Package) for transport improvements in Bath designed to reduce the reliance on the private car. This includes improved bus routes, a bus rapid transit running from Newbridge to the city centre, increased park and ride capacity and a new site at Lambridge, and better information systems.

2.2 The Future for Bath Vision

In 2005 B&NES Council initiated a major strategic review of the future of Bath known as the Future for Bath Vision. This was subsequently tested and further developed by Ernst & Young through a business plan and spatial plan has been widely shared and discussed with other stakeholders in the City generating a broad consensus of support. Further studies are now underway, of which this is one, to flesh out and develop the vision. The Vision will also feed into and inform the Local Development Framework and is key to the development of the DMP.

In broad terms the vision says that:

- Bath is not in such a healthy state as it seems to outsiders. It suffers from a number of problems and is experiencing relative economic decline. Without action there is a danger it will slip further behind.
- Nevertheless it is fortunate in having very significant assets and potential. The future lies in exploiting these and playing on Bath's distinctive heritage and strengths and reinforcing sense of place.
- The key themes which should underpin and inform future development are water/wellbeing, pleasure/culture, creativity/design, knowledge /innovation and living heritage.
- The city centre will need to expand to accommodate some increases in housing, retail activity, office and visitor accommodation. This is necessary to enable change and stimulate regeneration. Bath Western Riverside and Bath Quays are major development opportunities.
- New economic activity will be typified by independent, small scale, creative and knowledge based activity attracted by the quality of the setting and in line with the vision.
- Further investment is required in transport and access arrangements, in creating an east-west axis, opening up the river and creating a high quality public realm. These are seen as essential unifying and enabling elements to realise the vision.

A number of studies have recently been commissioned or are underway which will help develop and inform the above concept. At the time of writing, most of these have yet to report

These include:

- A public realm and Movement Strategy (Bath)
- Business Development and Employment Land Study (B&NES)
- A Cultural Development Strategy (Bath)
- A Retail Strategy (B&NES)

2.3 Other local policy documents

Current planning policies pertaining to the area are contained in the unadopted B&NE Somerset Local Plan. This is generally favourable to tourism development in the built up areas and supportive of the development of walking/cycling routes and the use of the waterways. Work has now started on the preparation of the core strategy for the Local Development Framework and this report will feed into that.

‘Better for Everyone’ the B&NES Community Strategy highlights several areas relevant to this study including the need to celebrate and reinforce distinctiveness and sense of place and the importance of adopting ‘green’ and sustainable practices.

The World Heritage Site Management Plan (2003) is an important document which sets out policies and actions to improve and safeguard the WHS. There is considerable overlap between the management plan and the DMP particularly in areas such as promoting awareness and understanding, managing and improving the public realm, improving signage and access arrangements, and visitor management.

Other documents we have consulted include the earlier B&NES Tourism Strategy (2001) and the Norton-Radstock Tourism Development Plan (2001) and the actions proposed in this document are consistent with these reports.

2.4 The importance of sustainability

People have been talking about sustainability and sustainable tourism for the past decade or more but the awareness of climate change is giving this a greater prominence and sense of urgency. B&NES Council, in common with many other local authorities, has signed the Nottingham Declaration on Climate Change which commits it to taking action to address climate change.

A concern for the environment is a key strand of this although sustainability also brings in wider considerations. The regional tourism strategy ‘ Towards 2015’ defines sustainable tourism *“as satisfying **visitors**, **businesses** and local **communities** without damaging the **environment** now or for the future”……”it is about managing the impact of visitors on the environment and on local communities, minimising adverse effects , whilst ensuring long term viability, with investment as far as possible aiming to keep spend in the local community”.*

2015 recommends seven practical steps

- Buy local
- Support quality
- Use resources widely
- Respect distinctiveness
- Offer car-free access
- Get local involvement
- Explain sustainability message

The importance of adopting a more sustainable approach is highlighted in numerous national and regional strategies including the Regional Spatial Plan and the Regional Sustainable Development Framework. The latter talks about the need to encourage greater use of public transport, extend the season, minimise visitor impacts, maximise the use of local suppliers, ‘green’ tourism businesses and involve the local community. The SW Climate Change Impacts Partnership has produced an action pack showing how tourism businesses can take practical action on this front.

As part of the consultation exercise for this plan we held a sustainability workshop with local stakeholders and tourism enterprises to explore these issues and discuss how tourism in B&NES should adapt. The results of this have been used to shape our recommendations.

2.4.1 What do local people think about tourism

The interests of the local community are a key strand in sustainable tourism. A survey of residents undertaken several years ago[1] suggested that local community is generally supportive of tourism and understands its contribution.

Fig 2.1 B&NES residents' views of tourism

93% said tourism was important or very important 88% said that tourism supports the local economy and provides employment for locals 2% said that the problems of tourism outweighed any financial benefits 55% said that the local tourism dept should encourage more visitors 25% said that visitors should only be encouraged out of season

Survey undertaken c2000

2.4.2 Attitudes of the tourism industry

The Enterprise Survey undertaken for this study suggests that local tourism businesses are already taking sustainability issues seriously and are interested in increasing their activity and involvement.

Table 2.2 Attitudes of the tourism industry to sustainability

	Currently taking action %	Interested in increasing activity	
		Very %	Quite %
Encouraging less dependence on the car	52	21	46
Reducing energy use & waste	93	60	32
Making more use of local suppliers	88	62	30
Taking account of local community concerns	63	37	43

Source: Enterprise Survey. 2007

2.5 Key themes

The analysis in this chapter highlights some key themes which the DMP has to take account of.

- Tourism is seen as an important part of the regional economy
- Tourism in Bath has more than just local significance it is a key part of the region's tourism portfolio and one of Britain's iconic tourism destinations.
- Bath is changing and will have to accommodate both economic and population growth. This brings risks but it also creates opportunities
- Tourism is an important part of the Bath economy and likely to remain so in the future. It needs to be seen in the wider context and related to other activities and functions.

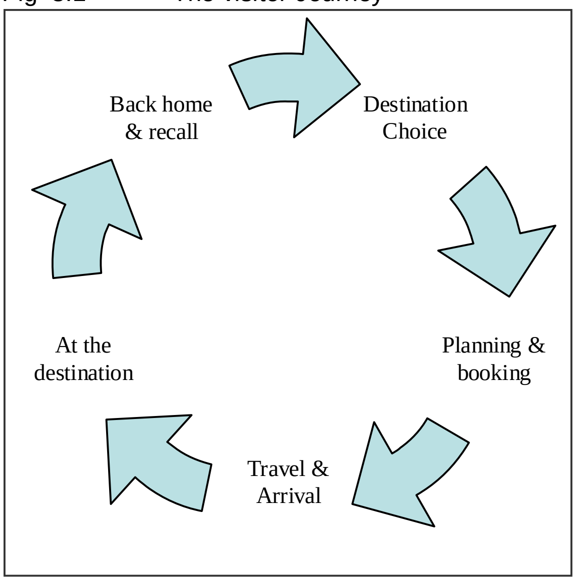
[1] Quoted in the B&NES Tourism Strategy 2001. It is not clear whether these were residents of Bath or B&NES.

- Sustainability is high on everyone's agenda. There is a need to reduce impacts and plan how we can accommodate growth and change without degrading the overall experience.

3. VISITING BATH

This chapter reviews the experience of visiting Bath today and is essentially an audit of the current tourism product. Because the aim is to influence visitors we have approached this from the visitors' perspective using the concept of the visitor journey as an organising framework. (see Fig 3.1)

Fig 3.1 The visitor Journey



3.1 The marketing of Bath

People form their image of Bath from a wide range of sources – from books, TV & film, internet, education, magazines and most importantly by listening to other people. Official marketing channels are just one small element in all this which highlights the importance of getting Bath featured in a range of media. It also argues for trying to co-ordinate and agree the messages being transmitted about Bath to avoid confusing and conflicting images.

Keeping Bath on people's radar is an iterative process. Each new generation has to learn about Bath for themselves and an awareness of Bath can't be taken for granted.

Table 3.2 Information used to choose England holiday destination

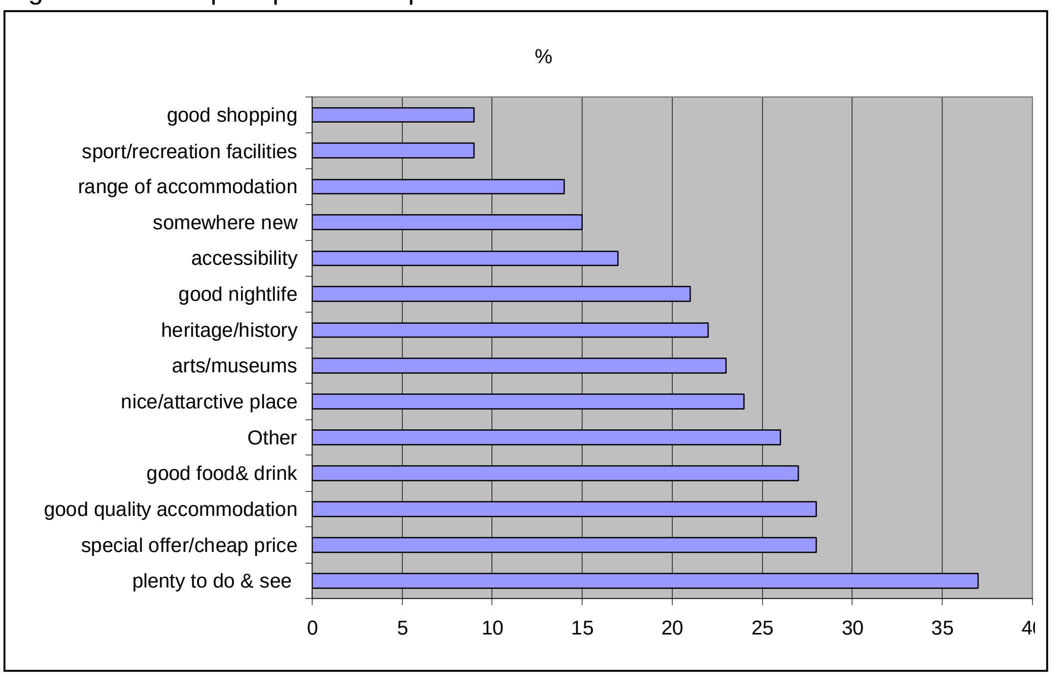
Sources of information	%
Previous experience	50
Advice from friends and relatives	47
The internet	46
Tourism brochures	27
Travel agents	23
Articles newspapers/magazines	17
Accommodation guides	15
TV/radio programmes	11
Advertisments in press	10
TV/radio advertisments	5
Direct mail	4

Source: Visit Britain 2006

3.1.1 Perceptions of Bath

We know relatively little about how Bath is perceived amongst the target audiences although it clearly has a high level of awareness as a destination. To help inform this we conducted a survey of non-visitors to Bath[2]. Some headline results are given below and further details are given in an appendix.

Fig 3.1 Unprompted descriptions of Bath



[2] Defined as people who had not visited Bath in the past 5 years. 500 telephone interviews with respondents in London & SE , aged 25-54 who take short breaks.

This research suggests people have a very positive image of Bath, and there were very few negative comments. Bath is perceived as an historic city, a beautiful place which provides a pleasant experience. Equal numbers perceive it as calm/peaceful and busy/lively (Fig 3.1). Other positive aspects are its built heritage and also its green setting. There is little indication from this research that people perceive Bath as boring and old fashioned.

Table 3.2 explores what respondents perceive Bath as being good for. This suggests that people have a fairly realistic view of what the City has to offer.

Table 3.2 Perceptions of Bath as a destination

	Score	v. good/ good
Heritage & history	4.59	92
Arts & culture	4.15	79
Attractive place	4.14	82
Good hotels	4.02	71
Good places to eat	3.89	69
Plenty to do	3.80	62
Easy to get to	3.74	60
Shopping	3.52	47
Nightlife & entertainment	3.18	31
Value for money	3.09	25
Sports & activities	2.93	16
Base to explore	3.94	75
Romantic weekend	3.84	73
Relaxing/pampering /chilling out	3.82	69
Fun weekend with friends	3.35	46
Family holiday with children	2.78	22
A longer holiday	2.65	20
Stag/hen party	2.57	17

Non visitor research. 2007
Score 5 = very good , 1= very poor

3.1.2 Existing marketing activity

A range of organisations are involved in directly marketing Bath to visitors:

- Hotels, visitor attractions and other enterprises in and around the city who undertake their own advertising and promotion, primarily to sell their product but often selling the destination as well. This includes bodies such as Bath Festivals Trust and Mozart Fest etc.
- The media as a whole including guidebooks, lifestyle magazines, broadcast media and web-based media which are covering Bath as well.
- Tour operators, coach operators and others in the travel trade selling Bath, sometimes as part of a wider package
- Tourist agencies such as SWT, Enjoy England and Visit Britain who are including Bath and Bath enterprises in their wider campaigns

What the guidebooks say…………….

"Undeniably beautiful and oozing an air of gentility and sophistication, Bath is an architectural gem…a grandeur unmatched elsewhere in Britain….a definitive air of languid exclusivity still pervades the city with its chi chi boutiques and galleries and specialist shops" (Lonely Planet England Guide 2006).

In the 19th century Bath lost its fashionable lustre and slid into a refined gentility that is still palpable…this doesn't mean that Bath is a museum. It is a lively and interesting with good dining and shopping , excellent art galleries and museums, theatre, music and other performances at all times of the year" (Fodor Gt Britain Guide 2006).

The work of Bath Tourism Plus (BTP) needs to be seen in this wider context. BTP marketing activity targets both leisure and conference visitors. It is primarily directed to the domestic market although there are some initiatives with partners in overseas markets. Marketing activity includes website, production and distribution of printed guides, direct mail, press/PR work, travel trade contacts, events organisation, enquiry handling and operation of an information centre. There is little or no above the line spend on advertising.

Campaigns tend to be PR led and focus on various themes and opportunities. Current / recent themes include Jane Austen, Feel good in Bath & Beyond, Love Bath, Tasty Bath etc .

Fig 3.3 BTP key statistics 2006

Turnover £1.1m
Members 367
Website hits 821k
TIC visitors 410k
Telephone calls/email 45k
Accommodation bookings 6k

BTP has a good website with strong visibility, clear structure and easy to navigate and lots of information on accommodation, events, attractions and itineraries. It is driven by a destination management system and allows on-line booking of accommodation and ticket sales. There are downloadable maps and an audio tour. In line with other destinations the website is becoming the dominant form of communication. The website presents a good picture of what Bath has to offer and stands up well compared to many destinations. Possible areas for improvement are the visual impact of the images used, more stimulating information about the range of activities on offer, the emphasis placed on sustainability and access for disabilities.

The main items of print are a guide to Bath with accommodation and themed pages on Baths attractions, a conference brochure and Winter Highlights detailing activities in the winter season.

BTP marketing is professional and generally well regarded by the local tourism industry. Other agencies actively involved in creating images of include Bath Festivals Trust, B&NES Heritage Services and Bath Film unit.

Table 3.4 What the industry thinks of BTP

Given the scale of its resources is BTP doing an effective job for tourism?	All (94) %
Very effective	6
Effective	47
Neutral	23
Not very effective	12
Not at all effective	0
Don't know	12

Source: Enterprise Survey 2007

3.1.3 How does Bath's budget compare to other destinations?

It is difficult to compare tourism budgets because they are often compiled on a different basis and many places are reluctant to reveal figures. Destinations also vary considerably in terms of the scale and nature of their tourism and whether they have a dedicated destination management organisation (DMO) in place. The big industrial cities tend to be big spenders whilst smaller historic cities such as Oxford, Canterbury and Cambridge spend relatively small sums. Some examples are given below.

Table 3.5 Spending by other DMOs

DMO	Gross spend*	Comment
Visit Chester & Cheshire	£2.7m	
CVOne (Coventry)	£1.5-!.75m	Marketing spend 2006/07
York Tourism Partnership	£2.7m	City Council +York Tourism Bureau
South Warwickshire Tourism	£1.4m	Stratford/Warwick. 2004 figure
Edinburgh & Lothian TB	£3.9m	2005 . Now taken over by Visit Scotland
Bath Tourism Plus	**£170,000**	**Marketing spend in 2007/08**

* Spend includes income generated from activity and includes staff. Figures are 2006 or nearest date.

3.2 Getting to Bath

Bath is very accessible and easy to reach and has access to a large catchment population. We estimate some11 m people live within a 2 hour drive.

- Access by road is good. The M4 (jn18) is 7 miles to the north of the city with the M4/M5 junction 7 miles further west. The A36 and A46 provide links to the north and south. Major centres of population such as Birmingham, Cardiff, Portsmouth/Southampton, Reading are all less than 2 hours drive away.

- Rail access is good. Bath Spa is on the main intercity network with frequent trains to London (90 mins) and Bristol (12mins). There are also direct rail services to the south coast, Wales and lindirect links to the Midlands. The wider district has railway stations at Freshford and Keynsham.

- Bristol airport (9th largest airport in the UK handling 5.5m passengers pa) is located just outside the District boundary on the A38 and serves over 100 destinations in the UK and overseas. Heathrow Airport is just under 2 hrs drive from Bath via the M4 as is Birmingham airport via the M5/M42. About 10% of Baths overseas visitors have entered the UK via Bristol airport, 73% via Heathrow. Access from Bristol airport into Bath is not ideal

- Bath is also served by some major long distance cycle routes and footpaths as well as the Kennet and Avon Canal.

3.3 Arrival and orientation

Whilst getting to Bath is relatively easy , moving around the City, especially by private car is very difficult, exacerbated by Bath's topography, the river which acts as a barrier and the constraints of the historic core. Just under half of Bath's visitors currently arrive by car.

There are three well used park and ride sites on the edge of the city and plans for a fourth at Lambridge to the east. These are well used by commuters and shoppers but it is not clear to what extent visitors make use of them. Lack of knowledge about how they operate might deter visitors from making use of these. Parking in the city centre itself is limited and the traffic circulation and signing system is tortuous and confusing for the visitor. It is difficult for visitors to know which car park to head for and where to park in relation to the city centre. This adds to congestion as people drive around looking for the best place to park.

Current transport plans are for improved bus services including a new rapid transit service linking park and ride to the west and east of the City. Parking places in the City are likely to decrease in future and car access to the city centre will continue to be constrained. This provides an opportunity to improve the pedestrian environment and public transport access.

Around 15% of Bath's visitors arrive by coach (2006 visitor survey) and it is estimated that over 11,000 coaches visit the city each year. Coaches are allowed to drop off at Orange Grove but must park in a purpose-built coach park on the southern edge of the City at Avon Street. This can accommodate 42 coaches but is not adequate to cope with peak demands particularly for major events such as the Christmas market.

Although showing signs of wear and tear the coach park does have some positive features. It is located alongside the river and has toilet facilities, seating and picnic tables, café, orientation maps and signposting. It is a relatively short walk from here to the historic core and main attractions, albeit through an unattractive part of the City. However, this coach park is earmarked for redevelopment in the medium term.

A coach strategy is in the course of preparation. This reviews a number of options and suggests retaining capacity in the city centre plus creating additional capacity on the periphery. It also recommends introducing new drop off and pick up points in the city centre.

The railway station in Bath is also well located for the city centre attractions although the area around the station is not a good introduction to Bath being dominated by traffic, the bus station and unattractive buildings. This whole area will be considerably improved by the Southgate redevelopment. The bus station is also being redeveloped as part of this package which provides an opportunity to significantly improve visitor welcome.

3.3.1 Orientation and signage

Just over a third of visitors are on their first visit, and many repeat visitors will be unfamiliar with the place. They will be seeing Bath with fresh eyes – and many will be confused and not know where to go.

There is a fairly extensive pedestrian signposting system in the city centre which guides people from the main points of entry to the key points of interest. This now looks somewhat old fashioned, neglected and cluttered although it is clearly better to have a signpost than not. There are also map panels in various locations but these are often poorly maintained and the maps faded or slipped. Again, something is better than nothing but the overall impression is disjointed and scruffy. This is well recognised and there are studies underway to completely revamp waymarking and signage.

"….often Americans and Australians say they would not return due to confusing one way system and lack of signage"   Bath Hotelier

There are four staffed information centres in Bath. One run by BTP (a VisitBritain 'Official Partner' TIC, one at the bus station and two provided by commercial operators one of which is at the station on the platform. This is positive although there is no co-ordination between these and it is not clear which of these if any are official and can be trusted. Again this adds to the overall sense of no-one being in charge.

Arriving in the rural areas presents little problem, most will come by car. Movement between the city and the rural areas, however, is more problematic.

3.4 Attractions and amenities

We discuss below the various elements that comprise the tourism offer in Bath and the surrounding area. Whilst some people come for a specific attraction or event it is often the combination and interaction of all these elements that gives the place its distinctive quality and appeal.

The appeal of the City is about its history and historic associations, the compactness and coherence of its Georgian core, the range and quality of its shops and visitor attractions and its charm. The Roman Baths and the new Spa are defining features of the city and indeed is the reason why Bath exists. Bath is unique: the only place in Britain with hot springs.

Fig 3.6 Top ten things visitors like about Bath

1. Architecture/ historic buildings/beauty/ streetscape (34%) 2. Atmosphere/charm/character (19%) 3. Specific visitor attractions (8%) 4. History (8%) 5. Range of shops /specialist shops (7%) 6. Gardens/parks (4%) 7. Abbey (4%) 8 Clean/beautiful (2%) 9. Compact/easy to get around (2%) 10. Lots of things to do (2%)

Source : Bath Visitor Survey 2006

Whilst Bath is the core driver for the wider area, the surrounding countryside has its own appeal as an attractive place to visit and to base a stay. Within a ten mile radius of Bath:

- The Cotswolds AONB lies immediately to the north of the city, one of England's iconic tourism brands
- To the east is the dramatic Avon Valley and over the border into Wiltshire lies the picturesque town of Bradford on Avon
- To the south east is Longleat and the Somerset market towns of Frome and Shepton Mallet. Stonehenge a key draw for overseas visits lies a little further away.
- To the south and west and extending into the district is the Mendip Hills AONB, Cheddar Gorge and the historic cathedral city of Wells and Glastonbury. Beyond the Mendips lies the coast
- To the west lies the city of Bristol one of Britain's most attractive large cities with much to offer the visitor

This rich hinterland adds significantly to the visitor offer. Visitors staying in the countryside will almost certainly visit Bath and the countryside extends the offer for those staying in the City.

The enterprise survey provides some evidence about how accommodation operators perceive visitors use the area. This suggests:

- Bath is the key driver for the rural areas and the city
- The surrounding countryside and wealth of places to visit are big draws for the rural area but also of interest to people staying in the City
- Bristol is not seen as a major draw
- Weston and the coast appear almost irrelevant

Table3.7 How important are the following elements to your visitors?

	Score: 1=high, 5=low		
	All	City	Rural areas
City of Bath	1.08	1.00	1.22
Surrounding countryside, Cotswolds, Mendips	2.30	2.58	1.75
Proximity to nearby attraction and places eg Bradford on Avon, Longleat , Wells, Cheddar	2.13	2.39	1.53
Bristol	3.84	3.80	3.59
Coast and Weston	4.33	4.40	4.06

Source: Enterprise Survey 2007

3.4.1 Visitor attractions

Visitor attractions in Bath and the surrounding area are listed in Table 3.8 together with estimates of visitor numbers. There is a strong emphasis on museums and heritage sites.

Visits to a sample of over 20 attractions in the B&NES Visitor Forum have declined since 2000, with a significant drop in 2001 followed by a gradual recovery. 2006 levels are still below volumes in 2000 (an 8% drop). By comparison attendance at a constant sample of attractions in the SW region went up in this period.

Reponses to the enterprise survey indicates that:

- Business has actually increased over the past 3 years, this is not inconsistent with the above results.
- A third of attractions are seeking more business at any time of the year but autumn is a particularly weak period.
- All would like more business in the week, weekends are busy.
- Most are keen to grow their business.

Table 3.8 Bath Attractions

Attractions	Type	Visitors '000	Admission
Bath City			
Bath Aqua Theatre of Glass	Craft shop		F
Building of Bath Museum	Museum	10,	C
Holburne Museum of Art	Museum	22	C
Jane Austen Centre	Museum	40	C
Museum of Costume	Museum	98	C
Assembly Rooms	Hist bdg		F
No.1 The Royal Crescent	museum	41	C
Roman Baths	Anc. monument	851	C
Sally Lunn's	Tea shop	111	
Victoria Art Gallery	museum	100	F
Bath Abbey /Heritage Vaults	museum	350	C
Bath Postal Museum	museum	7	
Museum of Bath at Work	museum	7	C
Museum of East Asian Art	museum	6	C
Prior Park Landscape Garden (NT)	garden	23	C
William Herschel Museum	Museum		C
Beckfords Tower & Museum	Hist bdg	2	C
Elsewhere in B&NES			
Avon Valley Country Park	Country park	86	
Folly Farm	Wildlife trust		
American Museum in Britain	museum	43	
)	Hist bdg	14	
Radstock Museum	museum	7	
Saltford Brassmill	Hist bdg		
Mumfords Vineyeard			
Somerset Lavender			

Figures relate generally to 2006.
Major attractions outside B&NES include those in Bristol, Longleat, Westonbirt Arboretum, Wookey Hole/Cheddar Gorge, Stourhead, Wells Cathedral, Dyrham Park, Iford Gardens,

Westwood Manor, Gt Chalfield Manor, Lacock Abbey. Avon Valley Railway, Farleigh Hungerford Castle, Tyntesfield, Stonehenge.

3.4.2 Heritage and museums

Bath has a very strong heritage product underlined by its World Heritage Site status and much of the heritage appeal lies in the coherent character and impact of Bath rather than the individual elements.

In terms of specific attractions the Roman Baths with an attendance of almost 1m visitors is an site of national and international significance and a key driver for visits to Bath. Other major heritage attractions include Bath Abbey, the Museum of Costume, Victoria Art Gallery, No 1 Royal Crescent and the American Museum just outside the City. There are also a number of smaller independent museums, some of which are very good, presenting different aspects of Bath and the area's history but attracting relatively small attendances, such as Building of Bath Museum and Radstock Museum. The Pump Rooms and Assembly Rooms offer a particular insight into Georgian Bath.

The Mayor's Corps of Honorary Guides offer daily walking tours of the historic city. A couple of commercial guiding agencies offer similar services in request. There is also a company offering open top bus tours.

Plans are in train to represent the Museum of Costume as the Fashion Museum and a £5m development plan to undertake conservation, interpretation and access works at the Roman Baths begins in 2006/07. The Holburne Museum (see below) also has ambitious plans for a lottery financed extension which will virtually double its size.

3.4.3 Arts and culture

The Victoria Art gallery has an important topographical collection views in and around Bath as well as a temporary exhibition programme of some importance. The Holburne Museum has an excellent collection of decorative arts and paintings including some Gainsboroughs. The Museum of East Asian Art has a small but interesting collection of oriental ceramics.

There is also a strong commercial gallery sector in Bath with at least 16 small galleries in the City offering contemporary visual arts for sale. This is a strength Bath shares with Bristol. There are reputedly over 200 artists living and working in the B&NES area.

In terms of performing arts, Bath has the Theatre Royal with its studio and children's theatre. This is well respected receiving and producing house offering a varied mix of drama, music and light entertainment. The Rondo Theatre is a 150 seat studio theatre run by a Trust. Bath is also known for its cultural festivals (see below) with an annual programme of events including literature festival, Film Festival, International Music Festival, Guitar Festival and Mozart Fest.

3.4.4. Entertainment and nightlife

Bath has a relatively weak evening entertainment offer. Compared to Bristol, its large near neighbour, there are only a handful of venues offering live music and hardly any clubs. A new comedy cabaret club (Komedia) is due to open in 2007 in an old cinema which will add a significant new facility. There are two cinemas, a multiplex (Odeon) and an independent (Little Theatre) offering a more diverse programme of films. Bath is seen to be a bit dead in the early evening immediately after the shops close. Bath has been selected as one of the 16 locations for a small to medium sized casinos.

3.4.5 Food and eating out

Bath has a large number of restaurants and places to eat from with an estimated . 150 restaurants and traditional pubs in city centre. Six restaurants have AA rosettes and 6 are featured in the Good Food guide (Bristol has 12)

A food festival 'Taste of Bath' part of a successful family of food festivals will take place in Victoria Park over 4 days in June. Other destinations are London, Dublin and Edinburgh and London. This showcases the area's restaurants and food producers with opportunities to sample menus and is expected to attract 15,000 people.

3.4.6 Shopping

Shopping is an undoubted strength for Bath particularly with regard to the volume and quality of specialist and independent shops where it arguably has the best offer outside of London. Visitor spend is key in sustaining the quality and depth of the shopping offer in Bath.

Traditional High Street shopping with the national multiples is concentrated around Southgate and Stall Street and a major development in underway at Southgate which will significantly improve the mainstream offer which has been looking tired. This development is due to come on stream in 2010.

Of more interest to visitors are the more upmarket quality shops on Milsom Street, New Bond Street and the host of smaller independent shops on the surrounding streets and alleyways. Other areas of interest include the more quirky and alternative shops in the Walcot Street/Broad Street area, and clusters of antique shops in the upper town in Bartlett Street and Margaret's Buildings. There are traditional markets in the Guildhall, Green Park station and in Walcot Street.

Earlier studies indicated that Bath is trading above benchmark levels and there is scope for a significant expansion of shopping floorspace. The Ernst & Young 'Future for Bath Business Plan' suggested expanding the retail core with new developments at Green Park and the Podium site. A retail strategy is currently underway to explore the potential in more detail.

The Christmas Market is a hugely popular event attracting an estimated 200,000 people into the city in early December and is one of the largest in the UK. This has a significant economic impact on the city, for every £1 spent in the market, people spend £2.25 elsewhere in the city particularly in shops and restaurants. 60% said the market was the main reason for visiting Bath. The market attracts 12% of staying visitors of whom over half came because of the market. Because of its success the market also causes some congestion, particularly with regard to the large number of coaches it attracts and this is an area that may require further management.

3.4.7 Spa facilities

Thermae Bath Spa opened in 2006 and offers four natural thermal baths plus steam rooms and treatments in a stunning modern setting including a roof top pool. This is a significant and powerful addition to Baths tourism offer which has received extensive publicity. It is on target to receive over 100,000 visitors in its first year and is proving popular with visitors and local residents. A survey in Feb 2007 indicated very high approval ratings (90%+) and 70% said it was their main reason for visiting the City. Several hotels are offering short break spa packages in association with the facility.

A new spa hotel is under construction opposite the Themae Spa which will offer spa facilities and is due to open in 2009/10. Several other hotels in and around Bath have spa facilities including the Bath Spa Hotel, Bath Priory, Lucknam Park. The Bailbrook Lodge Hotel has been recently bought with plans for conversion to a spa hotel.

3.4.8 Sport & recreation

The most notable sports facility in Bath is probably Bath Rugby for which Bath is internationally known. The Rugby ground has a dramatic setting in the heart of the city along the river and attracts a gate of c10,000 for its home games. There is an urgent need to redevelop the stadium to provide additional capacity and upgrade the facilities. Bath Rugby are keen to proceed but this is a contentious issue because of the ownership of the site and is currently in the hands of the Charity Commissioners.

Other sports facilities and events of note include the Race course and the University which is a centre of excellence for sports studies. The Bath Half marathon attracts 10,000 runners plus spectators. The City has just been awarded the 2008 UK School Games.

B&NES is well provided with linear recreation routes for walking, cycling and boating. Several national cycle routes cross the area with many traffic free sections. These include the Bristol to Bath Railway Path, The Avon Cycle way and Colliers Way. There are various national trails and regional routes for walking including the Cotswolds Way linking Bath to the Cotswolds, Limestone Link to the east and south of the district, the Avon Valley Way to Bristol and many other circular routes. long distance footpaths and regional. The River Avon and Kennet and Avon Canal are navigable from Bath to Bristol and there are boat hire facilities in Bath.

3.4.9 Events and festivals

The main regular festivals and events taking place in Bath are shown in Table 3.9. These can be important in providing the necessary trigger for a visit and can be useful vehicles for generating media coverage. Other noteworthy major events taking place within the surrounding area outside B&NES, include Badminton Horse Trials (May), Gatcombe Park Horse Trials (Aug) Cheltenham Gold Cup (March), Bath and West Show Cheltenham literary and music festivals racing and rugby fixtures.

Various agencies organise the Bath Events including Bath Festivals and Batb Tourism Plus. A Festivals Forum brings together all the groups engaged in these and other smaller events to share experiences and help co-ordinate activity. Bristol also has a significant programme of events and co-ordination is needed at a sub-regional level to avoid clashes.

Table 3.9 Festivals and events

		Est Numbers '000
Literature Festival	March	12
Half Marathon	March	10 +
International Music Festival	May	15-18
Fringe Festival	May	Na
International Guitar Festival	June	Na
Taste of Bath	June	15
Film Festival	Oct	Na
Mozart Festival	Nov	Na
Christmas Market	Decr	200

Source: The Tourism Company. Figures relate to 2006.

3.5 Staying in Bath

We estimate there are 247 hotels[3], guesthouses and B&Bs in B&NES providing over 5000 bedspaces. In addition there are 250 self catering cottages, 3 caravan sites, 2 marinas and some group and university accommodation. The latter is generally restricted for tourist use to Easter and summer vacations.

The majority of the accommodation stock is located in and around the City and primarily consists of hotels, guesthouses and B&Bs. Accommodation in the rural areas is more mixed and consist of self catering cottages, some caravan sites, smaller hotels, ins and B&Bs. Most of the service accommodation is in old buildings, there are relatively few modern, purpose built hotels.

Table3. 10 Total known stock BANES 2005

	Establish ments	Bed spaces	Units/ pitches
Hotels	51	3175	
GH/Inns	38	545	
B&B/ Farm	158	1653	
Total serviced	**247**	**5373**	
Self Catering	162		250
Touring Caravans/tents	3		314
Group Accommodation	6	358	
University/college	1	1239	
Marinas	2		150
TOTAL	421		

Source: SWT . Known stock graded and ungraded

[3] There is no reliable comprehensive listing of accommodation in B&NES. The following figures are from SWT database of known stock but previous work has shown that these figures can significantly under and over estimate by as much as +/- 25%.

The Visit Bath guide (2007) contains 102 hotels and guesthouses with 1725 rooms in and around Bath. This provides a useful snapshot of the serviced accommodation stock.

- 77% of the accommodation is in the City
- Just over half (56%) is graded 3 star and above (AA/VB)
- Average size is 17 rooms, median size is 8 rooms
- There are only 4 hotels with 100 rooms or more
- Single room rates vary from £20 - £850,
- Median single room rates range from £39-£70 per night.
- Only 10% hotels /GH have a minimum single room rate in excess of £102.
- There are only a handful of branded chains, the rest are independents
- None of the accommodation establishments have joined the SWT Green Tourism Business Scheme

Some of the larger and more significant hotels are listed in Table 3.11.

Table 3.11 Larger Bath Hotels *

Hotel	No. of Rooms	Brand/Group	Grading	
			Accom	Rest.
City				
The Bath Priory Hotel	31		4 stars	M* 3R
The Royal Crescent Hotel	45	Von Essen	5 stars	3R
Queensberry Hotel	29		3 stars	
Menzies Waterside Hotel	112	Menzies hotels	4 stars	
Abbey Hotel	60	Best Western	3 stars	
Bath City	150	Hilton	4 star	
Pratt's Hotel	46	Forestdale Hotels	3 stars	
The Francis	95	MacDonald Hotels	3 stars	
Express by Holiday Inn Bath	126	Holiday Inn		
Bath Spa Hotel	104	MacDonald Hotels	5 star	
Lansdown Grove Hotel	60	Marston Hotels	3 stars	
Elsewhere in B&NES				
Limpley Stoke Hotel	67		3 stars	
Bailbrook House	78		4 star	
Webbington Hotel	59	Best Western	3 star	
Combe Grove Manor & CC	42		4 stars	1R
Centurion Hotel	44		3 stars	
Lucknam Park	41		5 stars .	3R
Outside B&NES				
Leigh Park Hotel	22	Best Western	3 stars	
Mendip House Hotel	40		3 star	
Woolley Grange	26		3 stars	2R
Ston Easton park	22	Von Essen	Applied?	

* Hotels with 20+ rooms, 3 star and above. M* =Michelin star, R =AA rosette

3.5.1 Changes in the bed stock

Table 3.12 Total known stock B&NES 2005

	Change in bedspaces/units 05-03
Hotels	-3%
GH/Inns	-8%
B&B/ Farm	-10%
Total serviced	**-6%**
Self Catering	+7%
Touring Caravans/tents	0
Group Accommodation	-18%
University/college	-24%
Marinas	+173%

Source: SWT . Known stock graded and ungraded

The figures in table 3.12 suggest there has been some contraction in the serviced accommodation stock between 2003 and 2005 with a loss of 6% of serviced bedspaces. Overall this amounted to a loss of 30 establishments and 330 bedspaces. The loss has been most noticeable in the B&Bs and guesthouse Sector. During the same period there has been an increase of around 17 self catering properties.

It is difficult to be sure how real these changes are given the quality of the data. Nevertheless, anecdotal evidence suggests that there has been a trend for a loss of the smaller guesthouses and B&Bs fuelled by the increase in residential value in the City. At the same time, farm diversification and the growth of second homes is fuelling a growth in the holiday cottage sector.

There is some interest from hotel developers in Bath but this has not translated into new development. The high cost of land and difficulty of finding sites is a constraint. The most recent developments have been the Travelodge (2002) a refurbishment of an existing hotel, The Holiday Inn Express (2002), addition of rooms at the Bath Spa Hotel. The only development on the horizon is the Gainsborough Hotel (Danubius Hotels) under construction opposite the Spa. Bailbrook Lodge has recently changed hands and is to be refurbished as a spa hotel, whilst Shearings the coach company have bought the Lansdown Grove Hotel. These developments in the pipeline will bring on stream a further 170 rooms by 2009.

3.5.2 Occupancies and performance

An overall guide to occupancies is given by SWT serviced occupancy survey although this is based on relatively small sample sizes (16-20 hotels in B&NES. 10-13 in Bath). In 2006, this indicated that:

- Room occupancies in Bath City averaged 69% 2000-2006.
- Occupancies have fluctuated year on by a few percentage points but were 68% in 2006 about the same level as in 2000
- The rural areas achieve lower occupancies (53%) that the City. The average across B&NES as 62%.

- Occupancies are consistently high from March to November. There is not a drop off in the summer which is the pattern for business hotels.
- On average 22% of guests are from overseas.

The larger and higher quality hotels are monitored via a separate survey (The Bench) This is based on an even smaller sample of 8 3&4 star hotels in the city so is not typical of the wider picture. This indicates in 2006:

- Room occupancy 77%
- Achieved room rates of £84.85
- REVPAR £65.97.

These are very high levels of performance. Bath performs way above the UK regional average and has higher occupancies than most major British cities which benefit from a strong business base. It is way ahead of Bristol and only exceeded by Edinburgh and London. Occupancies exceed 75% for all months apart from Jan & December.

This means that hotels in Bath are effectively full for much of the year and because of this can charge high prices.

3.5.3 The enterprise survey

This comprises responses from 73 accommodation enterprises in Bath and the surrounding area and gives a further insight into current business performance in 2007.

- Annual occupancies were estimated at 68% for hotels and 62% for guesthouses/B&Bs, very similar to the SWT figures.
- Weekday occupancies are much lower (50%) than weekend (79%)
- Self catering properties are averaging 38 letting weeks pa.
- The majority of enterprises (77%) are reporting increased business over the past 3 years. A quarter say business has increased significantly.
- More business is really only needed in the winter Nov-Feb.= and during the week.
- Just over half are keen to grow their business
- Lack of physical capacity is the main barrier to growth

3.6 Holding a meeting in Bath

Conference and meetings business is potentially a good fit for Bath because its peaks and troughs complement the pattern of leisure business ie peak time midweek and in shoulder periods. There are currently 35 venues listed in the conference guide. These are a mix of hotels and other venues (some rather special) half of which are outside the city.

The enterprise survey suggests that hotels currently get around 16% of their business from conferences and meetings.

Table 3.13 Venues outside hotels

Venues	Max seated	Exhib space
Assembly Rooms	500	632m2
Guildhall	360	642m2
Pump Room	300	632m2
The Forum	1700	400m2
Bath University	380	1260m2
Bath Racecourse	250	300m2

Source: venues and Events Directory 2007

- There are some high quality venues available in the area. Most are historic buildings which can add something special but can also bring constraints. There are no purpose-built venues.
- Most have relatively limited capacity – typically 100-200 delegates.
- There are 3 venues that can take over 500 delegates and the largest , the Forum can accommodate 1700. These are theoretical capacities as venues cannot necessarily supply the catering, breakout and exhibition requirements as well.
- Hotel capacity is a constraint for taking large conferences. The largest hotel is the Hilton with 150 rooms and there are only 3 other hotels that can take 100. Hotels are also busy and sometimes unwilling to offer significantly discounted rates or block book allocations.

Various studies have looked at the potential for building a new conference venue in Bath. The general conclusion is that a smaller multi-purpose centre with a capacity of 4-500 and a mix of cultural and conference programming could be an appropriate way forward. Bristol which also suffers from a lack of purpose-built facilities is currently developing an indoor arena at Temple Meads which will contain facilities for conferences.

There is no overall measure of how many meetings are taking place in the Bath venues each year but it is likely to be several thousand. BTP conference desk receives c 400-500 enquiries a year and almost 7000 website visits. An analysis of the enquires received in 2006 indicate that:

- The majority originate from London and the South East, many are local
- Corporate clients account for a third, associations and charities 16%, public sector 11%
- 30% are for residential conferences
- 85% of bookings are for city centre venues
- Busy months are May, Sep and Oct. Quietest months are Jan, Dec and August.
- 80% of enquiries are for meetings of 100 or less. Only 3% are for meetings of 500+

3.7 Skill/labour force issues

Recruitment and retention of staff has been a major problem for the hospitality sector for many years, eased recently by the influx of workers from the EU accession countries. The enterprise survey suggests that this is not a major problem in Bath at present although this could change. Only 21% respondents indicated they had difficult problems in recruiting/retaining staff, 37% experienced occasional problems and 32% had no problems. Self catering operators seemed to have marginally more problems than serviced accommodation and attractions.

3.8 Organisations involved

There are lots of organisations involved in Bath which have an influence or say in tourism or the management of the tourism product.

Bath Tourism Partnership (BTP) was set up in 2003 as a private /public sector partnership by the Council and the B&NES Initiative. This acts as the Destination Marketing Organisation for Bath. It is financially supported by the Council under a SLA but also generates funds from its marketing activities and membership base of just under 400 enterprises. It primarily focuses on marketing and PR activity, operates the official TIC, a conference desk and manages some events. Total operating budget is £1.1m.

A number of trade associations represent different elements within the local tourism industry. These act as networking group and lobby on behalf of their members. Associations include Bath Restaurateurs Association (BRA) , Bath Hotels and Conference Associations (BHCA , Bath Independent Guest House Associations (BIGHA) and Bath Area Self catering Associations (BASCA). ABLE (Association of Bath and District Leisure Attractions) produces as a guide to visitor attractions. The Heritage Services Department provides a secretariat and support to the Attractions Forum a group of over 20 visitor attractions in Bath.

Bath Festivals Trust is an independent company established to operate the Music Festival,and Literary Festival. In addition it operates a box office serving a number of events and venues and acts a secretariat to the Festivals Forum.

B&NES Council is a unitary authority and is responsible for managing the public realm and infrastructure in the City and is also the planning and highway authority. Its remit includes responsibilities for toilets, signage, street cleansing, parks and open spaces, lighting, licensing, parking etc and also operates several visitor attractions.. All of these have a significant impact on the visitor experience. B&NES council financially supports both the Bath Festivals Trust and BTP.

The two universities are an important resource for Bath. Their 20,000 students bring enormous vitality and life to the City whilst visiting friends and relatives are an important niche market. The universities have an international profile and help promote an image of Bath, are centres of creativity and enterprise, attract conferences and international events and provide both accommodation (out of term time) and facilities for conferences.

4. BATH'S VISITORS

This chapter summarises what we know about the scale and nature of visitor activity in Bath and the surrounding area and current perceptions of Bath. .

4.1 How many visitors?

Based on national surveys[4] South West Tourism estimates that B&NES attracts just over 3/4m staying visitors a year about a third of whom are from overseas. Together it is estimated these visitors spend around 3m nights in the district and inject £170m into the local economy. Bath also attracts over 3m day visitors[5] with an associated spend of £150m. These figures need to be treated with caution; they are broad estimates derived from national level surveys not accurate measurements of what happens on the ground.

This suggests a length of stay of just under 3 nights for domestic visitors and over 5 nights for overseas visitors.

Table 4.1 Volume and value

	Trips (000)	Nights (000)	Spend £m
Domestic	508	1397	77
Overseas	269	1514	91
Total staying	777	2911	168
Day visits	3438	-	150

Source: SWT 2005 estimates

Visitor spending benefits a range of enterprises, most obviously the accommodation sector but also shops, restaurants, attractions and transport. Note that day visitor spending in shops and food outlets significantly outweighs that of staying visitors. The economic impact of this spending was estimated in 2005 to be responsible for supporting 8200 jobs across B&NES amounting to 10% of employment in the area.

Table 4.2 Where they spend their money

	Staying visitors	Day visitors
Accommodation	35%	0
Shopping	19%	42%
Food & drink	22%	38%
Attractions/entertainment	10%	10%
Travel	14%	10%
Total spend	£168m	£150m

Source: SWT 2005

[4] UK Tourism Survey (UKTS) , International Passenger Survey (IPS) , UK Day Visit Survey (UKDVS)

[5] Tourist Day visits involving non regular trips of over 3hrs duration ………

4.2 Who are the visitors?

Most staying visitors to B&NES are on holiday, typically for short breaks of 1-3 nights duration. Visits to friends and relatives (VFR) account for about 1 in 5 of all visitors and business visits over a quarter. Overseas visitors show slightly different patterns to their domestic counterparts. They are less likely to be on holiday and more likely to be on business. Overseas holiday visits to the UK as a whole have remained static over the past decade.

Table 4.3 Trip purpose

	All	Domestic	Overseas
Holiday	48%	53%	40%
Business	28%	26%	32%
VFR	21%	21%	20%
Other	3%	0%	8%

Source: SWT 2005.

A more detailed snapshot of visitors to the city of Bath in the summer is given by the Bath Visitor Survey, last carried out in the summer of 2006[6]. This on-street survey primarily captures leisure visitors. Some key features are as follows:

- Just over a third of visitors are staying overnight in Bath. The rest are more or less equally split between day visitors from home or holidaying elsewhere. Bath is part of the tourism appeal of the wider sub-region.
- 72% were staying in serviced accommodation and 12% with friends and relatives
- Visitors are mostly adults. Very few (11%) had children with them.
- 40% were aged 55+. The rest are fairly evenly spread across the age bands. There appears to have been a slight increase in older age groups since 2001.
- 61% are in social classes ABC1 (19% are AB). Day visitors are marginally more downmarket than staying visitors.
- The average length of stay is 3.8 nights for staying visitors and 5.5 hours for day visitors.
- .I in 3 are on their first visit though this figure rises to I in 2 for staying visitors.
- 43% have come by car 16% by train and somewhere between 12-16% by coach. (Others walked no the city centre or came by bus).

Visitors are not homogeneous. Table x below shows some of the variations between staying visitors, day visitors on holiday and day visitors travelling from home.

[6] Bath Visitor Survey 2006. Carried out by SWT on behalf of BTP

Table 4.4 How different groups vary from the norm

Staying visitors	Day visitors from home	Day visitors holidaying elsewhere
		Higher proportion from overseas
	More likely to be with children	Less likely to be with children
	Younger	Older
Higher social class		Lower social class
	High level of repeat visit	
		Least time spent in Bath
	More likely to use car/bus	More likely to be on coach tour
Highest spending		Lowest spending
Least likely to recommend Bath	Most likely to recommend Bath	

Source: Bath Visitor survey 2006.

4.3 Market segments

The Enterprise Survey undertaken for this report provides some further evidence about the visitor profile of staying visitors. Different types of accommodation serve a different market mix.

- Short breaks predominate in serviced accommodation
- Longer holidays are more important for self catering
- Business tourism is relatively modest and only really significant for hotels.

Table4.5 Business mix by accommodation type

Segment	Hotels (%)	Guesthouses/ B&B (%)	Self catering (%)
Short breaks 1-3	51	64	32
Long holidays 4+	7	9	54
Other leisure	10	16	15
General business	20	15	7
Conferences/meetings	16	4	1
Overseas	19	33	28
Domestic	78	67	72

Source: Enterprise survey 2007

4.4 Visitor trends

Visitor numbers depend on a variety of factors and are heavily influenced by external factors such as the state of the economy, political unrest and increasing competition.

There is a widely held view in Bath that visitor numbers are in decline. In fact this is very difficult to verify because the national surveys are based on small sample sizes at the Bath level and methodology has also changed over time. This makes trend data unreliable.

- Bath has certainly suffered a drop in overseas staying visits. Visitor numbers fell by a third from 2000 to 2002 as a result of Foot and Mouth Disease and nervousness due to the Gulf War. Since then numbers have increased although have not yet returned to their previous level. All destinations suffered a drop in overseas visits in 2001 but most have shown a stronger recovery. As a result Bath has dropped from 10th in the league table of top towns/cities in 2000 to 13th in 2006, Bristol has moved up the league table in this period.

- It is almost impossible to determine what has happened to domestic staying visits over the same period in Bath or B&NES because deficiencies in the national survey make comparisons unreliable at this level. Domestic visitors account for 2/3 of Baths visitors.

- Visits to a sample of over 20 attractions in the Bath area have followed a similar patter to overseas visits with a drop in 2001 followed by a gradual recovery. 2006 levels are slightly below volumes in 2000 (an 8% drop). Figures to a constant sample of attractions in the SW region went up in this period.

- Hotel occupancies as measured by the SWT occupancy survey have shown marginal fluctuation from year to year but room occupancies in Bath in 2006 are similar to occupancy levels in 2000. There may have been some loss of bedspaces over this period (although we do not have comprehensive figures for the whole period - see Table 3.11) so this may suggest a slight drop in staying visitor numbers which would accord with the fall in overseas visitors over this period. Countering this there has been a slight increase in self catering accommodation in the district.

In the absence of any harder information, our best guess is that tourism levels in Bath are broadly static and may well have declined marginally since 2000. Most of this is probably attributable to the fall in overseas visits.

The enterprise survey suggests that for those still in operation business has actually increased over the past 3 years. This does not necessarily indicate that tourism across the destination as a whole is increasing as the number of enterprises could have fallen.

Table 4.6 Business trends

In past 3 years has business…..	
Increased significantly	26%
Increased a little	45%
Stayed about the same	22%
Declined a little	6%
Declined significantly	1%

Enterprise Survey 2007

4.5 What do visitors think about Bath?

Bath has a high profile as a visitor destination and is well regarded. It consistently features highly in independent travel awards as voted for by consumers almost always appearing in the top 8. It consistently outscores other small historic cities.

Other accolades include:

- Most popular UK tourist city outside London (hotels.com)
- 3rd best city in the UK (Lonely Planet)
- 9th most successful city ('Which?' Good Food Guide 2007)

Table 4.7 Ranking in Travel awards

	Guardian/Observer	Conde Nast
2006	3	8
2005	7	7
2004	8	4
2003	7	5
2002	7	2
2001		3

Source: Publishers

Other evidence of satisfaction comes from the Bath Visitor Survey. This compares visitor experiences of Bath over time and also benchmarks Bath against other historic towns. Key findings are:

- People have very positive reactions to Bath. 92% rated it a good or very good experience, higher than the average for similar places.
- 97% would be likely or very likely to recommend Bath to someone else. Again higher than average for other historic towns.

Most aspects of the Bath (city) experience are rated as good or very good by visitors and in this respect Bath performs at a similar level to other historic towns and cities in England which undertake the same survey.

Areas where Bath scores relatively poorly are to do with infrastructure, public realm and value for money.

Table 4.8 Scores for elements of the Bath experience

Better than good	Good to above average	Average or below
Range of attractions Attractions service Range of eat/drinking Eat/drink service Range of shops Quality of shoping env. Service in shops Upkeep of parks and o/space General atmosphere Feeling welcome Feeling safe Safety from traffic Overall enjoyment Accommodation service	Ease of parking Attractions vfm Eat/drink vfm Road signs Pedestrian signs Display maps Toilets cleanliness Streets cleanliness Nightlife Overcrowding	Cost of parking Availability of public toilets

Source: Bath Visitor Survey 2006

5. FACTORS AFFECTING THE FUTURE

The future shape of tourism in Bath will be partly determined by what happens on the ground but will also be conditioned by what is happening in the world outside. This section examines these changes and looks at the implications for tourism. It draws on research undertaken for the West of England Tourism Development Plan. Understanding and responding to these trends is critical to devising a robust strategy for the future.

5.1 Continuing economic prosperity

Tourism is fuelled by economic prosperity and in the short term, at least, prospects for the world economy are cautiously optimistic although this picture could change given further oil price rises, political instability or other disruptions such as a mass outbreak of bird flu. In terms of the UK, consensus forecasts are for the economy to keep on growing at just over 2% pa[7] whilst Mintel forecasts a growth in real personal disposable income of 12% (2006-10)[8].

Economic growth will undoubtedly generate more leisure travel and holidays as well as business tourism. Increasing affluence also fuels a demand for higher standards. However, past trends have been for most of the growth in holiday taking by the British to be focused outbound. Other concerns about the future are the decline in pension entitlement and the likelihood that most people will have to work longer. This may constrain the spending power, leisure and energy of the grey market, which has been an important driver of tourism in the last decade, especially in Bath.

5.2 Tourism growth is not guaranteed

World-wide, international tourism has been growing at 5% pa for much of the past thirty years and UNWTO expects this will continue to grow over the next 15 years albeit at lower rates in Europe[9] (3% overall but less in the UK).

Overseas tourism to the UK has shown long term growth (doubling over the past 20 years). Despite setbacks in 2001 due to FMD and 9/11 it has more than recovered lost ground and VisitBritain expects growth to continue, albeit at more modest rates. Inbound holiday tourism however has remained sluggish and has shown little overall growth over the past decade. Arguably Bath is still feeling the effects of FMD in terms of overseas tourism, which has not recovered in line with national trends. The make-up of overseas tourism is likely to change as more visitors from emerging markets such as China and India discover Britain. These visitors may have less knowledge of places such as Bath. Reflecting these changes, the Roman Baths issued some 13,000 audio tours in Mandarin last year.

The prospects for domestic tourism (accounting for two thirds of B&NES tourism) look less promising. Whilst outbound tourism (British going abroad) has shown strong and continuing growth, tourism by British people at home appears to be static and

---

[7] UK Economic Outlook. PWC. 2006.
[8] British on Holiday at Home . Mintel 20006.
[9] 2020 Vision. WTO

some sectors are in decline. The statistics are poor but the best guess is that domestic tourism has been broadly static since 2000. Mintel [8] have forecasted a drop in the volume of domestic holidays by 2010 with value staying around the same. Sectors which are likely to do better than others are short breaks and business tourism. Increased economic activity drives business tourism whilst a more scattered population stimulates VFR trips.

Leisure Day visits are more difficult to forecast but expectations are that volumes will continue at existing levels but the shape, spread and preference will change. Increasing traffic congestion may begin to have a constraining effect on the distance people are prepared to travel.

5.3 A changing population

The UK population is more or less stable in terms of numbers (5% growth expected by 2016[10]) but in common with most of western Europe it is ageing. Over the next ten years (2006-2016) most age groups will show a modest increase (apart from children aged 0-14) but the big change in this period will be a 20% increase in the over 65 age group. This could be important for Bath and has implications for accessibility and transport. Traditionally this group has been more likely to take holidays and breaks at home although this pattern is changing and an age group that has gown up with holidays abroad is reluctant to kick the habit.

Other changes we can expect to see will be:

- A more ethnically diverse population
- More single person households, fewer traditional family households
- More of the population will be classified as ABC1. Mintel forecast a 10% increase in AB groups (2005-10)
- Better educated and more mobile households
- The probability that many people will have to work longer to fund their retirement

It is important to bear in mind that each new generation present a blank canvas with no fixed preconceptions. Destinations cannot assume knowledge and familiarity or rely on past reputations to carry them through. Raising awareness and educating people has to be an ongoing process.

5.4 New lifestyles and aspirations

Attitudes towards holiday taking and use of leisure time are changing. Changes noted by commentators such as Henley Centre, Mintel and others include:

- The search for well-being and escape from a world where people are full-on, all the time. There is a need to wind down, turn-off, and recharge the batteries as a response to increasingly busy and pressured lives.
- At the same time people want to get more value out of their leisure time and pack more in.
- A fragmented market where people increasingly seek tailor-made experiences to satisfy their own particular needs and predelictions. This can apply even to members of the same family group.

[10] Population projection by Government Actuary . 2004 based projection

- Discerning, sophisticated and 'streetwise ' consumers who are widely travelled and know what they want and pride themselves in getting value.
- The search for special and memorable experiences as opposed to simply choosing a destination. People are looking for authentic and distinctive experiences as a reaction against increasing homogeneity. They are also seeking experiences which are aspirational, confer status and which fit with their lifestyle and aspirations.
- The rise of the green and ethically motivated consumer and an increased awareness of environmental issues. People want to feel good about their choices although evidence suggests that they may be reluctant to significantly change their behaviour. This is borne out by recent Visit Britain research.
- Increasing importance of brands, customer reassurance and recommendation in an era of seemingly limitless choice, fuelled by the internet.

5.5 Technology and transport

Information technology has had a huge impact on the way in which we access information about tourism and leisure products and the way in which we book them. Home internet access is now available to 52% of the UK population with half of these on broadband. Half of overseas visitors to London had planned their trip using the internet[11]. The internet has lowered distribution costs and also makes it possible for small enterprise to reach customers on the other side of the world. It has also made customers more price aware and promotion driven and shortened booking times. New developments, particularly with development of mobile phone technology and WiFi will open up even more possibilities. There is a generation now which has grown up with this technology and which takes it for granted. Increasingly consumers will be able to tailor make their own experiences and packages (dynamic packaging).
.
Transport has also seen some significant changes. The growth of budget airlines has had an enormous impact in terms of opening up new destinations, changing price perceptions and making possible the expansion of the outbound short break market. Most of this traffic has benefited European destinations rather than UK ones, although there is potential for developing inbound traffic. It also means that the comparators for Bath are European cities such as Venice, Bruge and Barcelona.

Traffic congestion will get worse. Already there are indications that some people are put off travelling to the West Country because of concerns about congestion and travel time. In the medium term it is likely that travel costs will have to rise. This is even more critical for shorter holidays and breaks although it may benefit relatively accessible places such as Bath. As an antidote to this 'slow travel' on foot, by bike or canal boat may be there may become an attractive proposition in its own right.

5.6 Environmental pressures and concerns

The emerging consensus is that climate change and associated pressures may make England a more appealing holiday destination whilst making traditional holiday destinations abroad more hazardous and unreliable (flash floods, hurricanes etc). Certainly a warmer climate will extend the season and make outdoor activity more appealing.

[11] London Overseas Visitors Survey 2004/5.

However, the impact of global warming on tourism is unlikely to be this straightforward and has the potential to wreak havoc with the world economy. It seems increasingly likely that the real environmental cost of flying will have to be reflected in fares and airport taxes which will affect both inbound and outbound tourism and may make domestic holidays a more attractive proposition. This could have a big impact on the short break market. Businesses and destinations will also face additional costs in adapting to these changes.

There are already early signs that a certain section of the market is becoming more concerned with ethical and environmental issues and will take this into account in choosing a holiday product[12]. Destinations and products which have a good environmental image and record may be able to charge a premium, although there is a danger of destroying credibility through superficial claims. Externally validated and respected schemes (such as the Green Tourism Business Scheme) are likely to carry more weight with consumers.

In the face of globalisation and concentration everywhere begins to look the same and you have to travel further to find the exotic or different. In this context, local distinctiveness is likely to become a significant driver for tourism and highly attractive for visitors. Regions that retain this will have added appeal. Bath faces considerable challenges in retaining its distinctiveness in the face of development pressures and the increasing conformity of the 'high street'.

5.7 Increasing competition

The most serious threat of all to tourism in Bath comes from new and invigorated destinations and products, both at home and abroad. Cruise ships, purpose-built conference centres, boutique hotels, revitalised English cities and short break destinations in Europe - to name but a few. The choice is staggering and all these are eating into traditional markets and setting new benchmarks against which Bath will be judged. In this environment, simply keeping position and retaining market share becomes a challenge and will require an ongoing commitment to investment in commercial enterprises, the public realm, and tourism marketing. Constraints on public sector spending in the UK may hamper this and will need to be addressed if Bath is to maintain its appeal.

5.8 Implications for the future

No-one can say with certainty what the cumulative impact of these changes will be. Some of these trends pull in different directions and may cancel each other out. There is no single model for success - each destination or region has a different hand of cards and a unique set of opportunities and constraints to contend with.

Key conclusions from this analysis are that:

- The overall size of the domestic market is unlikely to grow. Growth will have to come from capturing market share from other places or tapping into expanding overseas markets.

---

[12] A recent survey by Trip Advisor of 1000 travellers worldwide found that – 40% take environmentally friendly tourism into account when making travel plans. 25% believe air travel should be avoided where possible, 34% said they would pay more to stay at an environmentally friendly hotel

- Competition is fierce. Retaining market share will be a challenge and will require a continuing programme of investment in marketing and product development.
- Short breaks are here to stay and will remain the dominant format for domestic staying visitors. This will benefit Bath but there is growing competition for this business.

Successful destinations will:

- Maintain their public profile and keep in the public eye exploiting a range of media.
- Continue to invest in quality and choice to meet the needs of discerning and experienced consumers.
- Make it easy for people to book and arrange flexible, last minute packages, tailor-made to suit their needs and exploit new technology.
- Create distinctive, civilised and well managed places (place making) which stand out from the run of the mill and make an area worth visiting.
- Offer a range of experiences for the visitor which are authentic, enriching, engaging and provide opportunity to refresh the mind and the body.
- Provide experiences which confer status and are seen as desirable and aspirational places to have visited.
- Demonstrate they are taking action to address environmental and ethical concerns.
- Provide a product and experience which has appeal to a range of different markets to avoid over exposure to risk and volatility.
- Establish a balance between the needs of visitors and those of permanent residents to avoid conflict and retain the feel of a real place.

6. THE WAY FORWARD

This chapter draws together the findings of the previous chapters, highlights the main issues facing tourism in Bath and sets out where Bath should be heading in terms of its visitor economy.

6.1 The starting point

Bath is a mature visitor destination with a long history and tradition of tourism stretching back over 2000 years – it is probably the oldest continually active visitor destination in Britain!

It is a very special place. Britain's only thermal spring; a World Heritage Site with an extensive Georgian core and intriguing relationship to the landscape beyond. There are few places, particularly in Britain which can claim to have such a coherent and attractive city centre. Its comparators are places such as Bruges, Venice, Florence, Salzburg and Sienna.

Despite being a mature destination it is still a major player in tourism and a very strong brand. It has high levels of awareness both nationally and internationally, continues to draw large numbers of visitors and delivers high levels of satisfaction. It features in the top ten UK cities and has one of the UK's top visitor attractions in the Roman Baths.

It has a strong and varied product. The key attractions are its heritage and architecture, shopping, food, culture, festivals and the revival of the spa The rural hinterland adds a further dimension to this and attracts visitors in its own right. It has a good quality hotel and accommodation stock achieving high levels of occupancy and earnings. All this makes for a very potent combination where the whole is more than the sum of the parts.

Tourism plays an important role in terms of the Bath economy, underpinning other economic sectors and supporting a more varied range of facilities than the local population could support alone.

Despite these undoubted strengths Bath also has some weaknesses in tourism terms which may undermine its future viability.

- Tourism is static and may be contracting
- It is over dependent on holiday tourism
- A lack of accommodation capacity constrains and inhibits growth
- It is expensive and losing ground in terms of value for money
- The product is difficult to change and refresh
- Some parts of the town are looking a bit ragged and run down, particularly around the gateway areas
- The quality of the public realm and ease of movement in and around the city is not of the standard one might expect from a place of this significance
- There is a lack of co-ordination in respect of destination management
- Bath could do more to capitalise on the areas outside the city centre.

BATH IS GOOD BUT IT COULD BE BETTER!

A SWOT analysis summarising strengths, weaknesses, opportunities and threats, based on our analysis of the visitor economy , is set out in Fig 6.1.

Fig 6.1 SWOT analysis

Strengths	**Weakness**
Highly accessible by road, rail and air Large national and international catchment Bath is a strong brand with international appeal Long history of involvement in tourism Significant film and media exposure Ranked in top ten UK city destinations High levels of satisfaction from current visitors Distinctive appeal and sense of place. WHS status and Georgian core Britain's only thermal spring. Unique spa heritage and offer. New spa adds significant asset. Iconic names and associations Jane Austen, Bath Rugby Roman Baths as iconic attraction Arts and culture and established festivals A solid events programme – Taste, Bath Marathon, Christmas Market Range and quality of speciality shopping Food and restaurants High quality countryside and destinations within easy reach Attractive small towns and villages Good linear routes for waking and cycling Good quality hotels, guesthouses and self catering High occupancy rates and good all year round business Proposals for improvements to key attractions Supportive council. BTP a focused DMO in place. Active conference desk and group. IT systems in place for on-line booking NE Somerset as a base for family holidays, longer stays Active associations for industry Good information base	Arrival and reception gives poor impression Poor signage and orientation Lack of nightlife and entertainment Public realm is shabby Staying in Bath is expensive Limited conference facilities to host larger events Limited business tourism base Short stay Lack of capacity constrains expansion Limited reasons to visit NE Somerset Static or declining levels of tourism Over dependence on holiday tourism Product is stuck, lack of new attractions / interest Limited attractions in rural B&NES Lack of investment in the product Local authority covers City as well as rural hinterland Moving in and out of Bath is not easy
Opportunities	**Threats**
Economic growth and population expansion will generate new demand Bath Western Riverside and other development sites A coherent vision for Bath Southgate redevelopment Forging stronger links between Bath and Bristol and surrounding rural area to expand the offer Expanding the accommodation base Canal and river for recreation and transport Walking and cycling routes have potential for further development Capitalising o the Bath vision and brand New arrangements for city centre management New generations, new overseas markets	Increased traffic congestion making access more difficult Management of public realm and infrastructure erodes the experience New development destroys sense of place Loss of coach park, loss of coach business Lack of capacity in accommodation Complacency due to past success Competition from other destinations Bath not keeping up with changing market tastes Planning/land constraints make it difficult to adapt the product External shocks/events damaging tourism. Climate change Economic downturn Loss of Bath Rugby Losing a range of accommodation and choice Loss of distinctiveness and independent retail offer Overcrowding Negative reaction from residents to tourism Reduction in pubic sector support and spending Skill and labour shortages

6.2 Factors which should shape our approach

Change is inevitable. Bath can't stand simply stand still even if it wants to because the world is changing around it and there are big changes in the wings. The question is where do we want to be and what do want to achieve. There are a number of factors which will shape and influence this and need to be taken into account. These are discussed below.

6.2.1 Helping to realise the Bath Vision

Bath is on the brink of some very big changes with external pressures to accommodate growth and some major development sites coming on stream which will open new opportunities and change the shape and feel of the city centre. It is important the DMP relates to these.

Considerable thinking has already been done around this and a broad consensus is forming about the shape and nature of the City in future. This will be further developed as work on LDF proceeds.

Current thinking is to:

- Expand the city centre. The Bath Vision is to accommodate some growth in retail, office employment and housing and extend E-W axis of the city.
- Recognise Baths past and unique heritage but to use it to provide a sense of direction for the future.
- Maintain and enhance a sense of place. Create a high quality public realm with and investment in public transport and access to make this work
- Use themes to inform the sort of place that Bath becomes with strong roots in the past - water/wellbeing, pleasure/culture, creativity/design, knowledge /innovation, living heritage.
- Create a mixed and diversified economy, a stimulating and living vibrant place to live work and visit - not a museum or theme park. An ideal place for contemporary living in the 21st century.

The future of the visitor economy has to be an integral part of the Bath vision.

6.2.2 Working towards a sustainable future

The concept of sustainability runs through all the strategic documents and should shape the approach to tourism. This is enshrined in the regional tourism strategy, spatial strategy and economic strategy. It is assuming greater prominence and urgency with the growing awareness of climate change and there will be increasing support to address this. It is the right thing to do but also (if embraced properly) has potential to confer a clear market advantage as more discerning consumers become more environmentally discriminating. This is not about discouraging tourism but does mean trying to steer the visitor economy into a more sustainable shape and structure.

In practice it means:

- Managing visitors to reduce environmental impacts
- Promoting value over volume
- Reducing the carbon footprint of tourism enterprises and improving their business performance by reducing waste, water and energy consumption
- Reducing reliance on the car
- Promoting local distinctiveness and sense of place

- Fostering local ownership and being sensitive to local community concerns and
- Encouraging local production and purchasing and maximising the amount retained in the local economy
- Improving the quality of the total visitor experience
- Monitoring impacts and adjusting action accordingly

Bath is well placed to put sustainability centre-stage, it fits in well with the wider vision for Bath and provides an opportunity for the City to differentiate itself

6.2.3 Adapting to a changing market needs

Tourism is essentially market driven and if the tourism sector is to continue to thrive it will need to respond to external changes and changing consumer tastes.

Increased competition and the prospects for tourism growth mean that it will be harder work to grow tourism. Simply retaining market share will require investment and a willingness to embrace change. Standing still is likely to be a recipe for stagnation and long term decline.

Successful destinations will:

- Maintain their public profile
- Invest in quality and choice
- Provide value for money and a positive welcome
- Offer easy booking, flexibility and tailor-made packages
- Offer a strong and distinctive senses of place
- Provide a range of experiences which are authentic, enriching and refresh the mind and body
- Offer ethical and sustainable products
- Cultivate a range of markets to reduce risk

If the visitor economy is to thrive then Bath needs to understand and respond to the needs of its customers. <u>There is a danger that Bath's relative success and prosperity leads to complacency and that people will fail to see the wider picture and look ahead.</u>

6.2.4 What does Bath want from tourism?

It is important to articulate what Bath as a 'community' wants from tourism and the visitor economy. We assume that this does not mean tourism at any cost but is about steering tourism in a way that makes sense in the wider context. For example:

- <u>Developing a thriving and sustainable sector of the economy</u> which helps diversify the economy, provides decent jobs and supports a wide range of businesses within and outside the city. Bath has limited options in terms of its economy and it makes sense to make the most of tourism, an area where it has some significant advantages.

- <u>Enhancing the quality of life for people</u> living and working in B&NES. The visitor economy helps to support a wider range and quality of arts, shopping and cultural facilities than could be supported by the local population alone. This adds to the attractiveness of Bath as a place to live.

- <u>Project a positive image of Bath</u> as an attractive and enriching place in which to work, live and invest. Tourism gives Bath much greater positive exposure than other similar sized places. The fact that people want to visit strengthens local pride and confidence in the area.

- Use the visitor economy as a means of <u>supporting and maintaining the character and urban fabric</u> of the City. The visitor economy provides an economic rationale for much of the historic fabric and also helps strengthen support for conservation and protection.

- <u>Manage and control the scale of tourism</u> so that it doesn't destroy the character of the place and totally overwhelm the city. Bath needs to avoid turning into a theme park which will erode much of its appeal. It needs to keep tourism at a level where it adds to the vitality of the place but doesn't become its sole rationale.

It is particularly important that we do not end up with a situation where local people feel that central Bath is primarily a place for visitors and not for them.

6.3 A strategy for tourism

In the light of the above considerations we propose the following approach to tourism in Bath and the surrounding area.

6.3.1 The aim

To develop a viable and sustainable visitor economy which continues to make an important contribution to the economic vitality of Bath and the surrounding area, enhances its image and standing, is in harmony with its unique environment, and adds to the quality of life for its residents.

6.3.2 A vision for Bath as a destination – where we want to be

A beautiful city, widely known, highly regarded and in the premier league of historic European cities.. A place which people aspire to visit not only for its architecture and its historical interest but because it is simply a great place in which to spend time. A vibrant, distinctive place with a strong independent and creative spirit reflected in the range and variety of its shops, restaurants, cultural life, , places to stay and access to beautiful countryside. A place which has a life and culture beyond tourism, which welcomes visitors but doesn't allow them to dominate, and where exploring and moving around the city is a delightful experience. A place that inspires people to come back to time and time again, always with something fresh to discover.

6.3.3 Key principles underpinning the strategy

The approach to tourism in Bath should be governed by the following key principles. These will determine the priorities and emphasis and run through all the various initiatives detailed in the following chapter. Together they give a flavour of what is proposed:

- **Aim high.** Many UK destinations aspire to be World class but few have the potential to realise this - Bath can. The aim is not to be the biggest but be one of the best and most sought after destinations in the UK. The benchmarks should be the best European historic cites. This means delivering a recognisably superior experience.

- **Focus on value not volume.** There is some scope for expanding tourism in Bath over time but growth in volume will need to go hand in hand with increased capacity and infrastructure improvements, otherwise there is a danger of degrading the experience. The overall emphasis should be on increasing value in its widest sense.

- **Position Bath as something special.** Baths' offer is about the quality of the total experience. A subtle combination of stunning setting, rich and visible heritage, a strong sense of place, a range of activities, an enriching environment in which to spend time, enjoy oneself and refresh body and spirit. Bath is historic but shouldn't be stuck in the past - it must be a living, vibrant place.

- **Link Bath to its hinterland.** Bath is a key driver of tourism for a wide area but the surrounding countryside has potential to broaden Bath's offer and extend the stay. These linkages can be strengthened to the advantage of both the city and its hinterland.

- **Freshen the offer.** The existing mix of facilities and attractions broadly right and doesn't need major surgery. The priority is to refresh the offer, make it appealing to new audiences and provide a reason to come back. Bath is a theatre which needs to stage new plays, a gallery which needs to rehang its collection from time to time.

- **Embrace sustainability.** Bath should see sustainability as central to its offer. It must look to the future, enhancing its image as a progressive place, and its appeal to a discerning market. This means making choices which reduce environmental impacts, maintaining levels of tourism which don't overwhelm the city and ensuring that the tourism sector is on board. A key part of this is securing acceptance and ownership by the local community. It also means pro-actively influencing and managing the visitors.

- **Adopt an integrated approach.** We need to look for ways of managing the city in a more integrated way so that the visitor economy is linked into wider considerations and all aspects of the visitor experience are brought up to the same standard. This requires better co-ordination of services and closer working of the public and private sectors.

6.3.4 Market positioning

We envisage that the market mix will remain broadly similar to now. Within this the aim should be to increase length of stay and spend, extend the season (although Bath enjoys a fairly even spread of visitors) and continue to deliver high levels of visitor satisfaction.

There is some concern that Bath's visitor profile is currently skewed towards the older age groups. This has some benefits in that the over 55s are relatively time and cash rich, receptive to the Bath offer and open to mid-week breaks. Nevertheless, it will be important to ensure that younger age groups are introduced to the attractions of Bath to ensure replacement. This means relatively sophisticated, culturally driven pre-family segments as opposed to stag parties. Pitching marketing messages at a younger age group will be unlikely to deter the older age groups who don't see themselves as old anyway.

Concern has also been expressed about the balance between staying and day visitors. Day visitor spending is extremely important for visitor attractions, shops and food outlets. and helps to underpin the infrastructure needed by staying visitors and the local population. For this reason we think that day visitors should continue to be an important market for Bath. The aim should be to better manage the impact of these and encourage longer stays.

The ideal visitor for Bath is someone who will enjoy and benefit from the special experience that Bath has to offer. Targeting these visitors is more likely to result in satisfied and appreciative customers.

Primary markets will be:

Who are they	**What are they looking for**
Domestic short break takers, ABC1, ranging from pre-family couples/friends to active retired, living within a 2 hour catchment	Short holidays weekend and mid-week, general interest, range of things to do and see in an attractive environment.
Overseas visitors from N America and Europe, couples/friends, aged 30-70	Short stays and stopovers using Bath as a stop o a UK tour or as a base to explore southern England. General sightseeing
Business and conference delegates	Corporate and small associations from 2 hour catchment/ M4 corridor, small meetings in a distinctive setting.
Independent day visitors of all ages, primarily from within 1 hr catchment.	Bath for shopping, general sightseeing, entertainment as day/ half day from home or holiday address.

Secondary markets which are less important in terms of size or value but are important for particular sectors of the industry include:

- Domestic longer holidays up to a weeks duration - based in the rural areas in self catering accommodation attracting families.
- Organised group visits and coach tours - domestic and overseas, which are made up of distinct segments eg overseas tours/excursions via Stonehenge, social club outings, education sector.
- Independently organised small group visits including extended families, hen parties, re-unions etc often based in self catering.
- Themed short break packages focused on a specific activity eg spa breaks, rugby breaks, cookery courses.
- Visits stimulated by events and festivals.
- B&NES residents and their visiting friends and families.
- University students and their friends and families.

6.3.4 Indicative targets

In the absence of any national or regional long term tourism forecasts it is difficult to make any sensible projections of future volumes in Bath. This is exacerbated by the lack of any hard data at a local level to act as a benchmark. The following should be regarded indicative targets illustrating the scale and direction of growth proposed.

The UK economy is currently forecast to grow at just over 2% pa over the next few years. We might expect tourism to grow broadly in line with this. This is an average figure; overseas tourism to the UK is likely to grow slightly faster whilst domestic tourism in the UK will grow more slowly. As Bath is already operating more or less at capacity it will be difficult to match this average figure and it is also arguable that it shouldn't seek to do so. Growth will require an increase in capacity and infrastructure, for example an additional 200 hotel bedrooms would only enable an increase of c4% in staying visits. The table below illustrates a modest growth scenario.

Fig 6.2 Illustrative targets

Measure	**2007-2016**
Staying visits	+ 10%
Staying visit spend *	+ 20%
Staying nights	+15%
Day visits	+5%
Day visit spend *	+10%

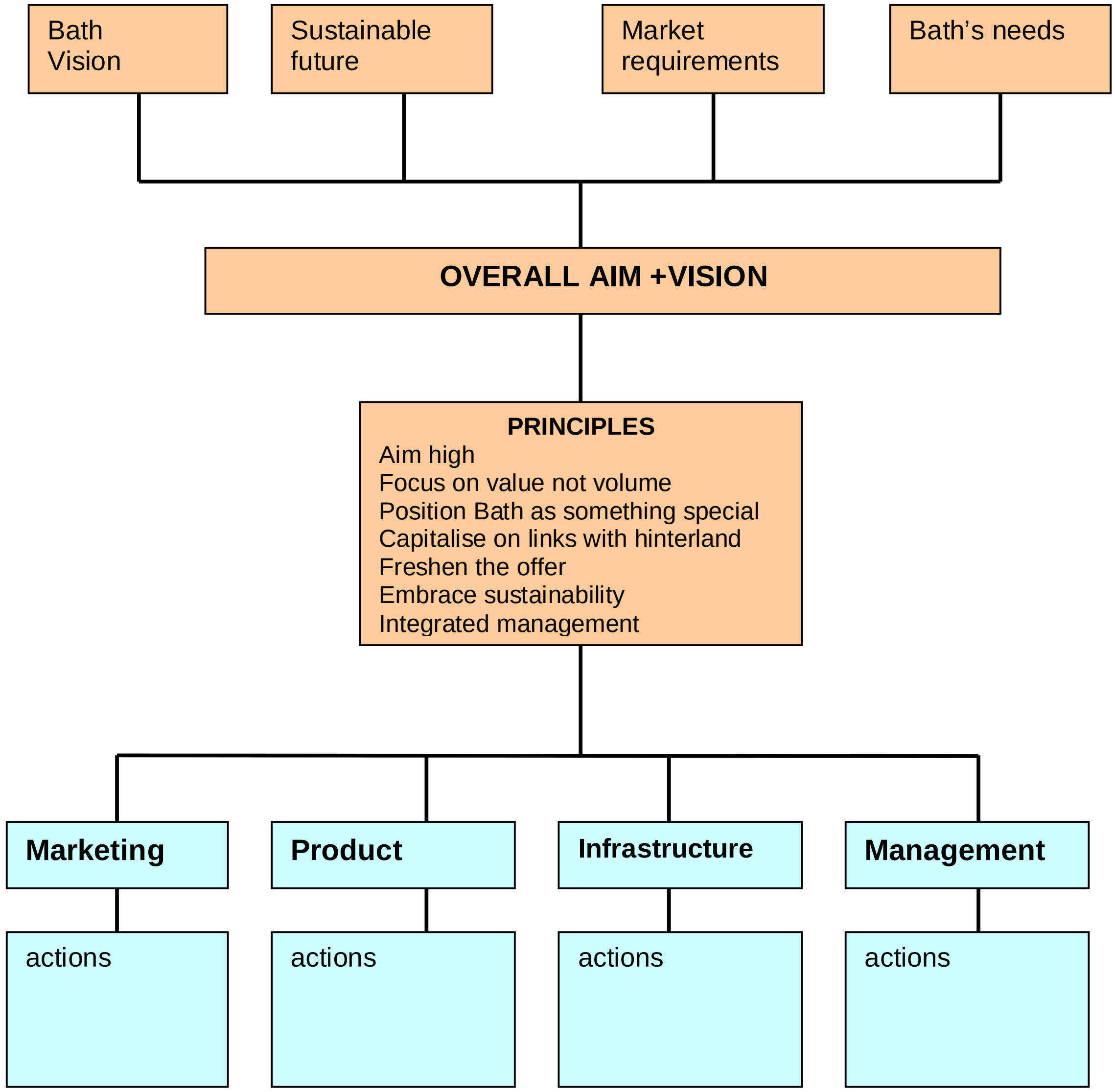
(* real terms)

6.4 Priorities for action

In order to deliver the above strategy, in the next chapter we outline some recommendations for action by various stakeholders. These focus on the key issues that need to be addressed and the most significant areas and should not be seen as excluding other areas of activity currently undertaken. Most of what is being done at present on the tourism front is sensible and should be continued unless mentioned otherwise. For convenience we have grouped them into four themes:

- Marketing and communication
- Tourism product
- Environment and infrastructure
- Management and leadership

The diagram over page shows how these relate to the overall aims and objectives


Bath Vision
Sustainable future
Market requirements
Bath's needs
OVERALL AIM +VISION
PRINCIPLES
Aim high
Focus on value not volume
Position Bath as something special
Capitalise on links with hinterland
Freshen the offer
Embrace sustainability
Integrated management
Marketing
Product
Infrastructure
Management
actions
actions
actions
actions

7. PRIORITIES FOR ACTION

This final chapter outlines priorities for action over the next ten years grouped into the four themes discussed in the previous chapter. It is not intended to be a detailed work programme or marketing plan for B&NES but it does highlight the key areas that need to be addressed if Bath is to realise the strategy we have outlined. We concentrate on additional areas of activity or areas where a change of emphasis is needed. It assumes that current activities will continue.

For each priority area we have shown how it links to the overall strategy, highlighted the key issues, recommended an approach and highlighted some specific actions and next steps. The latter are summarised in a table at the end which identifies responsibilities, timing and some resource implications.

Although for ease of presentation we have identified discrete priority areas it should be recognised that there is considerable overlap and synergy between these.

7.1 Marketing and communication

This strand is concerned with how Bath presents itself in the marketplace as a visitor destination. Without marketing activity there is a danger that Bath will gradually be eclipsed by other destinations. The aim is to ensure Bath remains on people's radar, to attract those groups of visitor who will enjoy Bath's special qualities and who in turn will benefit the City, and develop new markets for the future.

It is important to emphasise that we are concerned here with marketing Bath and the surrounding area as a visitor destination. This is a different task from projecting an image for the Bath & North East Somerset Council and its services.

Research indicates that the City of Bath has a powerful and recognised identity, that this is a strong motivator of trips even for people staying in the rural hinterland, that the local authority boundary has no meaning for the visitor and does not define a coherent destination. Our recommendation is to lead with the strong image of the City but highlight its relationship to the surrounding towns and countryside, both within and outside B&NES District. . 'Bath and Beyond' is a sensible and useful strapline that should continue to be used.

Destination marketing in Bath is currently led by BTP working with both B&NES Council and the private sector. The range and focus of marketing activity is generally good, in line with current practice, professionally delivered and well received locally and we recommend that this should continue. The areas below are more about emphasis or new initiatives.

Developing areas of new activity will require some additional resources as only so much can be achieved by reallocating priorities. Table 3.5 suggests that BTP is relatively under-resourced to carry out its role compared to many other destinations and making more impact in a competitive environment will be difficult without extra funding from either the public or private sector.

Key priorities are:

- Revisiting the Bath Brand
- Keeping Bath on the radar
- Reviewing market emphasis
- Marketing the off-peak
- Enriching the visit

These priorities are discussed below.

7.1.1 Revisiting the Bath brand

Marketing will be more effective if a clear and consistent message is being communicated about Bath and what it has to offer. This can get blurred in a destination where there are many organisations and enterprises promoting their own view of the place and may lead to conflicting messages. There are also concerns that the traditional image of Bath may not reflect current reality or future aspirations.

Bath should seek to develop a sharper and more explicit brand identity which is shared and supported by other stakeholders and which will underpin all communication. This has wider implications than just tourism and it is important than the tourism brand relates to the wider identity used for promoting the city as a whole to the outside world. This is more than just developing a logo. It is about defining the essence of the place, what makes it special and ensuring that this is reflected in communication, design and most importantly what is experienced on the ground.

Whilst B&NES Council is the main driving force behind destination marketing this destination brand will not be the same as the Council's own brand identity which is aimed at a different audience, although the one can draw from the other.

As part of this study some initial exploration of this has been undertaken through a workshop and research has also been undertaken on perceptions of Bath by non-visitors. The non-visitor survey showed people generally have very positive views about Bath. Some preliminary conclusions from the workshop are shown below.

Pivotal themes for organising ideas

- Water, health and well-being
- Pleasure and enjoyment
- Creativity and Innovation
- Knowledge and Learning
- Contemporary living, modern business
- World centre for sustainable living
- Excellence across the parts that makes up Bath

Bath is a well-established and strong brand but there is a need to:

- **clarify** and remind the audience of enduring themes
- modernise and make it **relevant** to new audiences
- proactively **manage** the brand through initiatives
- ensure that it **pervades** inside and out i

Further work is now required to take this forward to:

- Understand how Bath is currently perceived
- Identify and agree the core values that make it special
- Examine key messages and images that relate to these
- Examine how this can be translated into design and marketing media
- Encourage other stakeholders to use this in their own communication through the development of a brand handbook
- Provide supporting material such as photographic images which relate to the brand. (The lack of arresting pictures of Bath is a current weakness)
- Ensure that the brand values come through into the design of the City centre.

Action points

- *Initiate a process to review the Bath brand and how the City projects itself to the outside world.*
- *Review tourism messages and marketing in the context of the emerging consensus on the wider Bath brand.*

7.1.2 Keeping Bath on the radar

It is critical that Bath continues to figure in people's minds as a potential place to visit. New generations and the emergence of new destinations means this needs to be a continuing process. The most cost effective way to achieve this is through third party press and media coverage which in turn requires a continual drip feed of interesting stories and information. This is an important role for BTP although it needs the active participation of businesses and enterprises across the tourism sector. It takes hard work and imagination to find enough eye-catching and newsworthy material in a small place like Bath. Marketing campaigns, themed promotions, new developments are important in providing a focus for this.

Much of this activity already takes place and should be enhanced, eg.

- More professional PR support available to tourism enterprises in Bath and the surrounding area to identify and generate potential news stories. Some form of training or PR workshop might be beneficial.
- Closer working with the Bath Film Unit to encourage programme making and filming in Bath and generate benefits from the publicity and interest surrounding film and TV shoots.
- Maintaining an attractive and user friendly website which comes high up in response to random searches is essential. BTP website scores highly in that respect and in terms of its functionality. It would benefit from being more visually striking and placing more emphasis on the diversity of the city showcasing some of its quirky shops and eateries, galleries and cultural events.
- Using Bath festivals and events as a major hook for PR coverage
- Orchestrating a regular series of familiarisation visits and press trips for journalists, travel trade representatives and conference organisers to Bath.
- Identifying and issuing regular press releases and seeking media coverage of Bath.
- Maintaining a high quality picture library for use by outside commentators to project a positive image of Bath.
- Promoting Bath as a sustainable, environmentally friendly and forward looking place.

Action points

- *Strengthen and co-ordinate PR activity to increase coverage of Bath and stimulate awareness.*
- *Commission stronger and more striking visual images of the City and surrounding area and encourage their use.*

7.1.3 Reviewing the market emphasis

The aim is to encourage modest overall growth (particularly in spending) whilst ensuring that Bath retains a robust market mix. Whilst the key market segments for Bath are unlikely to change dramatically in future it is important to keep these under review in order to ensure that Bath is keeping pace with market changes and is concentrating on those markets with the most potential to deliver benefits.

Overseas tourism is the segment with the strongest potential for growth and given its relatively high profile Bath is well placed to tap into this. Bath can be sold as a stop on a UK touring holiday and also as a base for exploring southern England (including the Cotswolds and London). In addition to the traditional markets of USA and Western Europe the emerging markets of Eastern Europe and the Far East offer significant promise and need to be explored. Overseas marketing is expensive and will almost always need to be done in conjunction with other local and national partners and there is potential to do more in this area if resources are forthcoming. Bristol Airport offers further potential.

Domestic short breaks. This is a core market for Bath but under increasing pressure. Research suggests that whilst Bath is well known and people are well disposed towards Bath some form of trigger is necessary to turn a thought into a visit. Keeping Bath in the public eye, promoting themes, using events as a stimulus is key to developing this market. Given capacity constraints more emphasis needs to be placed in promoting the off-season and mid week and rail-based breaks. This an area where a better understanding of market segmentation, destination choice and booking behaviour would help target marketing. More qualitative research is needed in this area.

Business and conference tourism. This is a good fit for Bath and ideally should be pursued more aggressively, although the lack of major venues, high occupancies and prices in hotels, lack of larger hotels etc is a constraint. Current marketing activity is largely reactive and consideration should be given to developing some more proactive sales activity in conjunction with local venues. It may be worth re-opening the idea of marketing conferences on a sub-regional basis with Bristol in order to tap into greater resources.

Day visits are an important part of the market mix and retaining current volumes and spending is important for maintaining the vitality of the tourism product. In terms of independent day visitors marketing is primarily about PR activity to maintain the profile of Bath and literature distribution. More emphasis should be given to campaigns with transport operators (particularly train operators) to encourage non car borne trips. As far as group visits go, the market is fairly clearly segmented and marketing is about direct communication with tour operators and coach companies. More work is needed here to explore how best to manage this demand and which segments have the best potential.

Local residents. This is an important but often neglected sector. They have a major influence on the visiting friends and relatives (20% of Baths staying visitors!) and are also an important group of stakeholders. Engaging with local people is an important part of sustainability and it is worth exploring how BTP could develop a greater dialogue with local people to develop a local sense of ownership of the tourism product. A particular subset of the local population is the student community – some 20,000 strong. Students and their visiting friends and family are a potentially important source of business for Bath and lend themselves to targeted promotions and out of season offers.

BTP currently has very limited resources available for above the line spending on marketing. Whilst it is possible to change the balance of existing marketing activity over time, the potential for developing new market areas is likely to be difficult without additional resources. Bath will be able to tread water but is likely to find it difficult to move forward,

Action points

- *Review current market priorities to ensure they are in line with the overall strategy objectives*
- *Identify and invest in market segments with future growth potential*
- *Seek and justify additional resources for increased marketing activity*
- *Feed priorities into annual marketing plan*

7.1.4 Marketing the off-peak

For much of the year Bath is already operating at capacity. Weekends are busy for much of the year and hotels are turning away custom. Bath is crowded, sometimes unpleasantly so, in the main season which has an impact on the quality of the experience and is undesirable in terms of sustainability. Whilst there is still a need to market Bath as an all year round destination until additional capacity is provided there is a strong argument for placing a greater emphasis in encouraging activity in quieter periods, particularly mid-week and winter.

This suggests placing more emphasis on:

- Business and conference tourism which typically takes place during the week and outside the main season and holidays.
- Targeting older visitors/ early retired who are more likely to be able to visit mid-week.
- Reviewing the festival and events programme to generate more activity between October and March.
- Encouraging longer stays (ie weekend plus) through special promotions with hotels
- Building up the existing Winter Highlights programme
- Encouraging visitors to explore and stay in the surrounding area outside Bath which doesn't suffer from the same congestion.
- Communicating with coach and tour operators to provide information about when Bath is likely to be unpleasantly full and adopting a pricing policy which encourages visits outside the busiest periods. A pre-booking system for coach parking might be part of this.
- Targeting students and their families who have a reason for visiting out of season.

Action points

- *Review marketing activity to place the emphasis on marketing off-peak periods*

7.1.5 Enriching the visit

Good as they are, Bath has more to offer the discerning visitor than the set pieces of the Royal Crescent Circus and Roman Baths. These are the hooks which catch the fish but by exploiting the lesser known, hidden gems and quirky side of Bath we can add depth to the experience and encourage people to return, again and again. Information delivery is key to this – helping people find their way and discover their own version of Bath through the maze of possibilities. The TIC and website make a good stab at this but more could be done to improve this.

Areas worth exploring are:

- A better guide to shopping in Bath. One of Bath's great strengths but it is surprisingly difficult for visitors to find their way around the tight maze of streets and identify the shops that might interest them. There are one or two commercial guides but these come and go. What is needed is a clearer overview of where the main shopping areas are located (which should be carried through into a range of media including orientation maps) and a better guide to interesting, specialist and independent shops which is readily accessible and regularly updated.

- The same can be said for eating and food in Bath, another under-exploited opportunity, although there are more commercially produced guides in this sector. BRA and BIGHA produce a helpful maps, distributed via hotels and guesthouses and downloadable from the website. More could be done to publicise the variety and quality of food and drink in Bath, a key aspect of the visitor experience. A guide to local produce and distinctive food offers would also be of interest.

- Local events which whilst not interesting enough to generate a visit in their own right can enrich a visit, often because they are an unexpected bonus. It can be difficult for visitors to access these and the Festivals Box Office could play a stronger role here.

- Hidden Bath. There are other aspects of Bath which are a closed shop to most visitors – nightlife, smaller museums and heritage sites, visual arts, association with famous personalities, film/TV Bath, architectural gem, the river, markets etc. More could be done to expose these via themed guides and trails, itineraries, use of events and public art, celebrity endorsements " my favourite bit of Bath". Attraction passes and vouchers can be a useful way of introducing people to less visited sites.

- Making Bath the walkable city where a key part of the experience is being able to freely stroll and explore in a pedestrian–friendly and attractive environment.

These are not new ideas and it is recognised that translating them into action is not straightforward. The answer doesn't lie in inundating visitors with yet more leaflets - it requires a more subtle and orchestrated approach which actively involves the suppliers and businesses and takes account of visitor behaviour. Websites and downloadable material have a part to play here. We suggest some topic groups might be established to develop ideas and take these forward. These should be treated as campaigns in their own right.

A related area is making visitors aware of the surrounding area. Whilst it makes sense to lead with Bath, the surrounding area has enormous potential to add depth and interest to a visit and act as a destination in its own right. 'Bath and Beyond' is very much the right message and should be a significant strand in marketing and information.

This means:

- Not being precious about boundaries and working with Bristol, and destinations in Wiltshire, Somerset and the Cotswolds where it makes market sense and where there are economies of scale to be realised.
- Developing and publicising itineraries and transport options to encourage people to move between Bath and the surrounding countryside and also Bristol.
- Using the attractions in the surrounding areas to boost the Bath product

Action points:

- *Explore ways to make visitors more aware of the depth and range of the experiences on offer in and around Bath.*
- *Identify target areas and work with different interest groups to develop initiatives.*

7.2 The tourism product

This strand is concerned with the specific elements that together make up the tourism experience in Bath - places to stay, things to see and do, entertainment and activities. Some of these facilities (Roman Baths, Bath Rugby, Thermae) may be capable of drawing visitors to Bath in their own right but in most cases it is the mix of facilities and attractions which underpins Baths appeal and makes for a rewarding experience.

The aim is to ensure that Bath has the right mix of attractions and supporting facilities in place to meet market needs, is keeping pace with changing market trends and can hold its own against other competing destinations.

Key priorities are:

- Increasing accommodation capacity and choice
- Making history live
- Creating a lively, living city
- Making more of festivals and events
- Planning for a new venue
- Strengthening the rural product

7.2.1 *Increasing accommodation capacity and choice*

If Bath is to continue to attract staying visitors then it needs to provide a range of accommodation capable of satisfying current market requirements and responding to changing tastes.

High occupancies rates in Bath hotels reflect the fact that much of the accommodation stock is effectively full at weekends, for most of the year. This leads to good returns for operators but also contributes to high prices for visitors resulting in concerns about value for money. Without an increase in capacity it will be very difficult to expand the numbers of staying visitors in Bath. New investment and development is also important because it provides an opportunity to inject fresh blood and enables new products and business models to be introduced.

Provision should be made for an increase in hotel capacity in Bath taking effect in the medium term to allow for the impact of current plans (95 4/5 star rooms are already planned in the Gainsborough Hotel and a further 75 at Bailbrook House). More detailed studies will be needed to quantify the potential for expansion but we expect there to be scope for at least one or two additional hotels during this period. (We estimate that an additional 100 hotel bedrooms would increase staying tourism capacity by c2%).

Hotel development in Bath is not straightforward because of high land costs, lack of business tourism to drive midweek occupancies and the difficulty of finding sites. This may explain why it has been hard to attract new hotel development despite the high occupancy and achieved room rates. Hotels may need to be seen as part of wider development packages in order to make them stack up financially and hotel requirements should be built into planning briefs for potential development sites.

Types of hotel which would enhance Bath's current offer include:

- A large (100+ rooms), modern, branded 4 star hotel with associated business facilities. (Conference facilities will be lost as a result of the Bailbrook Lodge proposals)
- Smaller boutique / town house hotels (c50 rooms) offering a sophisticated, contemporary design-led experience (eg Malmaison, Abode, Alias hotels)
- Apart hotels / self catering (eg Base to Stay)
- Additional budget/limited service accommodation on edge of city sites to provide value for money accommodation.

Other accommodation priorities for the area include:

- Maintaining a range of accommodation, particularly good quality B&Bs and guesthouses both in and outside the City. There is some evidence that this sector (traditionally good value for money) is shrinking. Planning permission for change of use to residential should be resisted.
- Additions to pubs, restaurants and inns in the countryside to provide small scale accommodation in both Wiltshire, Somerset and Gloucestershire.
- Good quality self catering cottages in the countryside, for which demand is strong. Most of these are likely to be second homes but there is scope additional conversion of farm buildings etc.

Action points

- Commission a more detailed study to explore future hotel demand in Bath
- Ensure that accommodation priorities are reflected in the new Local Development Framework.
- Contact hotel groups/ developers to raise awareness of development opportunities.

7.2.2 Making history live

Historical associations and the physical heritage of Bath are the key drivers for tourism. Even for those not particularly interested in heritage the historic townscape of Bath provides the backdrop and setting to a host of other activities and makes Bath special. We do not see a need for introducing additional heritage attractions; some are already struggling to make ends meet and we do not think this would add appreciably to Bath's appeal to visitors. The main priority, in tourism terms, is to ensure that this rich heritage is still available as a viable resource for future generations and is presented to visitors and locals alike in a way that excites, informs and entertains. Maintaining public interest is fundamental to the future conservation of these buildings.

We must continue to seek new and innovative ways to engage the interest of audiences and this is well recognised by some of the leading heritage sites, which are currently planning or undertaking new developments. The Visitor Attractions Forum is a useful body which brings together all the main attractions in and outside the city and provides a forum for sharing ideas and pursuing joint activity.

There is also considerable overlap between this strategy and the WHS Management Plan and a need to maintain close liaison with the WHS management structures. The two documents can gain strength from each other. It is worth considering formally linking the management of the WHS into any future city centre management organisation.

Recommended approach:

- Use the new developments in the pipeline (Roman Baths, Fashion Museum, Holburne, American Museum) as they come on stream to awaken fresh interest in Bath's heritage and provide a hook for press coverage.

- Encourage all museums and heritage attractions to review the presentation of their collections to the public in the light of current visitor expectations. There are some excellent examples of small museums in the area (Radstock Museum, Museum of Bath at Work) which provide an excellent experience with limited resources. Some form of peer assessment or independent inspection may be helpful here. The VQAS scheme operated through VisitBritain may be a useful model to draw on.

- Encourage all museums in Bath and the surrounding area to incorporate a general introductory message which sets the museum in the wider context of the history of Bath and advertises the presence of other museums in the area.

- Consider producing a new piece of print as an introduction to Bath's history (The Making of Bath?) which would combine a broad overview with introduction to main museums, landmark buildings. This could be a saleable item of print (a souvenir in its own right) or downloadable from website and related to a heritage trail.

- Improve the interpretation of Bath by using new technology to deliver self-guided tours. (An interesting approach is being developed in Stratford-upon-Avon with a virtual tour readable on PDAs at various hotspots in the city)

- Use public art and street theatre to mark and interpret the history of Bath in thought provoking ways.

- Re-visit the idea of a heritage pass to provide access to several museums as part of a package.

- Seek to establish a programme of major exhibitions (possibly on a biennial basis) which will draw on local and regional collections and connections and showcase an interesting aspect of Baths history. (eg Stewing Alive)

Action points

- *Use the Visitor Attractions Forum as a key channel of communication with the heritage sector.*
- *Explore the potential for developing an introduction to Bath's heritage and a more co-ordinated and integrated approach across existing museums.*
- *Highlight the synergies between this strategy and the WHS management plan.*
- *Encourage innovation in presentation and interpretation and identify some key projects to champion. Encourage the use of new technology.*

7.2.3 Creating a lively, living city

The experience of visiting Bath is multifaceted. Despite being a World Heritage Site Bath isn't a museum – it is a living, working city with a strong shopping offer, arts and cultural facilities, a wide range of places to eat and drink, major sporting events and a re-launched spa. For many visitors it is this eclectic mix of high quality and independent enterprises that gives Bath its special appeal. Most of this is provided by the private sector. It is vital that the richness, diversity and quality of this offer is maintained and enhanced.

Recommended approach:

- Support Bath Rugby in its desire to develop its ground in the centre of Bath. This is an important icon for the City, generates visitors and adds colour and interest to the centre. This is part of a mixed-use centre which contributes to the vitality of Bath.

- Encourage the survival of an independent and quality shopping sector which is a major strength for Bath and also helps underpin the viability of the shopping centre as a whole. The key to this is encouraging the major land owners in the city to adopt a more positive and long term approach to managing their property portfolios. B&NES as a major landowner could take a lead. This would seek to retain a mix of independent shops as a USP for Bath. (At the time of writing a retail study is in preparation which will have more to say on this subject). A similar approach should be taken to restaurants and cafes.

- Consider developing additional retail space in the Green Park area to build on the success of the farmers market and alternative shopping offer which already exists there. There is potential to build on this to create a critical mass of outlets with an organic, slow food, local produce emphasis.

- Introduce a policy on empty shops to use them as temporary galleries for displays on arts, craft, museum collections. There may be potential to use such premises as temporary homes for start-up businesses.

- Encourage shops in the centre to introduce late night opening on certain nights over a period of time to generate some life in the city centre between 5.30pm-7.30pm. This should be co-ordinated with some form of entertainment.

- Work with the BRA and other restaurateurs to explore the idea of a month long food festival in Bath to give greater prominence to the eating offer. This could involve special menus and promotions and some form of competition or award. The timing of this should be chosen to boost a low period in the calendar possibly November and it would complement the existing Taste festival.

- Seek ways to get greater involvement and engagement of the retail and food and drink sector with Bath Tourism. The formation of a city centre management company might assist this.

- Continue to pursue the development of a medium sized casino in Bath which would add another facet to evening entertainment. This should be modest in scale, sophisticated in nature and based in the City Centre, possibly in association with a new hotel.

- Give more prominence to themed packages, developed by the hotels or by BTP in association with other facilities both in Bath and outside. Examples include art lover weekends in association with galleries in Bristol, antiques, spa, rugby packages. Themed years might also be worth considering. The main benefit of these is not necessarily in selling bednights but in getting exposure for Bath as a destination. The website provides an opportunity for visitors to tailor make their own packages (Dynamic packaging).

Action points

- *Ensure that the Local Development Framework supports the retention of a lively mix of activities and strong independent offering in the City centre.*
- *Identify and introduce management policies which will stimulate the above*
- *Pursue the idea of attracting an appropriate Casino development.*
- *Support Bath Rugby in its desire to remain in the City Centre.*
- *Ensure that the marketing of Bath reflects the theme of a lively/living city.*

7.2.4 Making more of festivals and events

Festivals and events are important drivers for tourism and should be a key part of Bath's tourism offer. They can reach different audiences and can be the trigger for a visit and they help to enliven a place and raise its profile. Major events can also generate significant business for a destination in terms of overnights generated by performers, exhibitors and organisers.

Bath already has a good reputation in this area with a programme of significant events. Bath Festivals is responsible for organising two of these events (Literary Festival, Music Festival) and has a responsibility for supporting other events through the Festivals Forum. BTP also organises two events (Taste and Christmas Market). Major events outside Bath (Bristol, Cheltenham) are also useful generators of visits to the city.

From a visitor economy perspective the main priority is to expand the festival and events programme and to use it to enhance the profile of the city and to fill beds and generate trade at low points in the calendar. It is recognised, however, that the organisers of arts and sports events may have different agendas from those of tourism and that their interest are not necessarily the same. Nevertheless, there is often an overlap which can work to the benefit of both. A lack of accommodation capacity at weekends is a constraint on growing attendance at festivals although there may be scope for packages making use of accommodation outside the city.

Recommended approach:

- Develop closer working relationships between BTP, Bath Festival and the Active Leisure Team. Some form of major events planning group might be helpful. This could evolve from the Festivals Forum.

- Draw up a major events strategy. This should concentrate on those events and festivals (sports, arts and others) which have the potential to attract visitors from outside Bath. The strategy should also take into account the timing of major events happening elsewhere in the sub-region and opportunities presented by the Olympics. The purpose of the strategy is to co-ordinate timing and prevent clashes, identify gaps in the calendar, co-ordinate marketing and publicity, and look for new opportunities. Topics should relate to the strengths of Bath and might include well-being/alternative therapies, affordable contemporary art, comedy, crafts etc.

- Give more exposure to those local events which aren't special enough to trigger a visit but provide added interest for those already here. It can be difficult for visitors to access these. Accommodation operators are key gatekeepers in this respect. Other possibilities include a monthly 'what's on' poster or display in the city centre.

- Make more of events outside the immediate area but which are big enough to create ripple effects over a wide area. Badminton, Bristol events, Cheltenham Gold Cup etc. There is a need for better co-ordination on a regional/sub regional basis to maximise the impact of the wider events calendar. Bath can benefit form events in Bristol and vice versa.

- Maximise the PR benefits of events which are an important hook for publicity. This is an important role for BTP.

Action points
- *Undertake a detailed audit of current events and their impact.*
- *Draw up a major events strategy for Bath and identify new opportunities.*
- *Develop closer working relationships and better co-ordination between festival organisers*

7.2.5 Planning for a new venue

The idea of developing a new multi-purpose venue in Bath has been discussed for many years, most recently in the ABL report but also in the Ernst and Young study. The concept is for a 4-500 seat multi-purpose venue capable of hosting conferences as well as cultural events.

This would fit in well with the vision for Bath, strengthen it as a business tourism destination and enhance its capacity to stage art shows and live performances. A striking modern building on a riverside setting would help project an image of a city moving forward. The downside is that this would come with a significant capital cost and most likely require some ongoing public subsidy.

Whilst this is unlikely to happen in the short term we think it is important that this project is kept on the agenda and not ruled out, as we believe it could bring significant benefits to the City. There may be possibilities of private sector involvement possibly in conjunction with a hotel development. There is also a possibility of incorporating a new multi-purpose venue in a redevelopment of the rugby stadium as has been done elsewhere. In the meantime we suggest it is worth exploring how similar scale facilities operate and have been funded in other places to help inform future decision making and ensure that options are kept open.

Action points
- *Gather further information on similar scale venues elsewhere*
- *Explore opportunities for incorporating a new venue in proposed developments*

7.2.6 Strengthening the rural product

The rural product is important for providing things to do for people staying outside Bath and helping to spread the benefits of tourism more widely. Within rural B&NES the attractions tend to be small scale and dispersed although there are some significant attractions of note in adjoining areas in Wiltshire, Somerset and Gloucestershire. It is worth trying to expand this.

The main opportunities lie with:

- Encouraging small scale accommodation development such as B&Bs, accommodation linked to pubs, conversion of redundant farm buildings to self catering accommodation and restaurants with rooms. Planning policies need to be supportive of this.

- Extending and publicising the already quite extensive network of footpaths, cycle routes and bridleways to provide access to the countryside. Where possible these should be linked to villages, public transport, places to eat and drink, and visitor attractions to enhance the appeal and create opportunities for days out. More can be made of the rivers and canals as both are linear routes providing opportunities for water-based recreation.

- Devising and publicising circular routes and itineraries which take people out of Bath and past attractions, and places of interest in the countryside.

- Highlighting clusters of activities and attractions which provide a critical mass of interest or which are on located on routes to other better known destinations. Craft outlets, cafes and specialist shops will contribute to the visitor appeal.

- Making more of the industrial heritage and artefacts of the rural areas such as the Somerset Coal Canal, mining heritage, railway heritage, Avon Valley brass industry etc.

- Encouraging the development of new attractions such as the Somerset & Dorset Railway Trust work at Midsomer Norton station or the development of additional visitor facilities at Chew Lake.

- Working with, and encouraging, local groups and partnerships such as the Norton Radstock Regeneration Company to think about tourism- related projects, events and promotion.

Action points

- *Ensure that the Local Development Framework supports tourism opportunities in the rural hinterland.*
- *Establish and promote itineraries which link together attractions and places of interest.*
- *Encourage the development of small scale attractions, activities and accommodation developments in the countryside*

7.3 Infrastructure and environment

This strand is concerned with improving the experience of getting in and out of Bath and moving around the city. It is also about those ‘unseen’ elements which contribute to the look and feel of the place, help to make it special and make it an enjoyable place in which to be – often referred to as the public realm. These are not primary reasons for visiting Bath but they make a huge difference to the quality of experience of being there and can have a strong influence on people’s willingness to return.

The aim is to make the experience of visiting Bath as enjoyable, distinctive and memorable as possible and of the standard commensurate with Bath’s aspirations.

Key priorities are:

- Making it easier to get in and out of Bath
- Better signage and information
- Improving the public realm

7.3.1 Making it easier to get in and out of Bath

Moving people in and out of the city centre is a major challenge for Bath. The aim should be to make it simpler for visitors to access the city and move between Bath and the surrounding area. Visitors have less local knowledge and need more information and guidance than local residents. In line with the aim of sustainability we should also be making it easier for visitors to leave their cars behind.

Recommended action:

- Encourage more day visitors to use the park and ride facilities. This is more difficult to do but the introduction of highway message systems and in-car navigation offer one route. It also needs stronger and more prominent messages on websites and from attractions. Consideration should be given to introducing a 'park and glide' river boat service from the proposed new Lambridge park and ride site into the city centre. This has worked well in Bristol.

- Produce a simple ' Getting around Bath' information sheet for display on the web and in hard copy form to send out to visitors. This would contain practical, helpful advice (positively rather than negatively couched) on how to reach Bath, where to park and how to access transport facilities in the area, giving greater prominence to public transport This would be a useful tool for accommodation operators to give/send to their guests.

- The coach parking issue needs to be resolved. Bath needs to positively manage the coach problem which won't go away and will continue to cause endless aggravation unless addressed. The coach strategy is a good start. This means expanding coach capacity in or close to the city centre, encouraging some coaches to drop-off and park outside the city, actively communicating and establishing a dialogue with coach operators, using pricing policy as a tool for managing coaches.

- Draw up a visitor parking strategy. Review the signage of visitor car parks on the approach to the city so that visitors are directed to specific (designated) car parks using brown/white tourism signing and encouraged to leave their cars rather than search for spaces closer to the centre. This should be coupled with visitor information provision at these car parks and linked to pedestrian signage.

- Provide better publicity for itineraries and routes from city centre and out into countryside using public transport options, walking, cycling and boat. Lobby transport operators to provide new routes and improve services, and work with car hire companies.

- Accommodation operators/owners being local are probably clued up to advise their guests but front of house staff come and go and may know next to nothing about the area. There is a need for familiarisation and local knowledge training.

Encourage accommodation and attraction operators to give incentives for visitors who have left their cars behind. This happens in the New Forest.

- Standard Information and orientation material should be provided at all entry points and transport nodes to enable visitors to find out where they are and how to get to their destination. (see below)

- Continue to press for better public transport links from Bristol Airport to Bath.

Action points
- Draw up a visitor parking and (traffic) signage strategy
- Develop a proactive coach management strategy
- Produce more information for visitors on how to access public transport in and around Bath and explore new methods of distribution
- Provide orientation material at all entry and arrival points

7.3.2 Better signage and information

Information provision is key to enabling visitors to get the most from their stay and is a valuable tool for managing visitors and encouraging them to explore. The aim is to enable visitors to quickly and easily access reliable information during their visit to Bath from the point of arrival throughout their stay to the point of departure. Although the city is compact it is easy to get lost in the dense network of streets and it can be surprisingly hard to find the interesting nooks and crannies that Bath has to offer.

Visitors obtain information through many channels from guidebooks to maps and there are lots of different agencies involved. Information provision in Bath is reasonable. Visitors can access the website, enquire by telephone or use one of four staffed information centres. There is also a pedestrian signing scheme and an assortment of map panels. Shopkeepers, taxi drivers and accommodation operators are also important information providers. The main need is to review and improve the current system and ensure that is integrated, comprehensive, works for the visitor and is of the right design quality.

A study is already underway looking at the mechanics and design of a way finding system. From the visitor perspective it should be capable of delivering the following:

- Welcome and orientation material at all significant points of entry and main nodes, eg car parks, station, coach park etc. This needs to comprise a standard map, information about the key sites and where to locate information, signposts to the main areas of interest and transport information. Information needs to be provided in a format and content that makes sense to visitors rather than the providers; this is sometimes overlooked.

- A wayfinding system comprising some combination of signposts and maps which enables people to easily navigate their way between key sights and attractions without cluttering up the environment.

- The design of new hardware should say something about the nature of Bath, should aim to be contemporary and distinctive and add to the quality of the public realm. A heritage pastiche would be a mistake. Above all, however it needs to work. There is a great danger in establishing systems which look good on day one but lack the flexibility to accommodate change or are too expensive to replicate.

Information provision is more than just about wayfinding. Other areas for action on this front are:

- Staffed information centres. The fact there are four of these is a potential strength for Bath although it can be confusing for the visitor. The BTP centre need to be clearly positioned as the official centre. It should take a leading role in developing a relationship with the other centres, sharing experience and seeking better co-ordination. There may be opportunities, for example, to encourage a better spread of opening times. Consideration should be given to a more uniform and visible branding of recognised centres.

- Front line staff have a key role in information provision and are the most ubiquitous source of information for visitors. Consideration should be given to providing some training for these people, possibly introducing a Bath Ambassador scheme and exploring whether there is role for street wardens or information stewards at peak times. There may be scope for building on the Welcome to Excellence courses offered by SWT and pursuing the idea of making these more destination specific.

- Poster sites for displaying visitor information. The current display panels are outdated and badly maintained but there is a useful role for some form of poster display panel advertising events or specific attractions. These should be incorporated in any new proposals for street furniture. BTP should take on responsibility for maintaining and updating these.

Action points

- Design and implement a new wayfinding system for the City centre
- Develop a training scheme to improve and harness the information skills of front line staff
- Encourage closer working between the existing staffed information centres

7.3.3 Improving the look and feel of the city centre

Bath should be aiming to provide an exceptional environment and ambience in line with the quality of its build heritage, setting and status as a WHS. It is universally accepted that it currently falls far short of this and visitor research also suggests that this is a weak point. (A Public Realm and Movement Study is currently underway to explore how this might be tackled)

From a visitor perspective areas that need to be addressed are:

- Design, replacement and maintenance of street furniture
- Cleansing and litter collection. Removal/ recycling of trade refuse from restaurants, shops and hotels. Public recycling facilities.
- Signage and advertisements
- Design of public spaces, seating areas and circulation routes

- Public art
- Street lighting
- ‘Dressing’ the city centre for special events and celebrations

Other areas that are important from the visitor perspective are:

- The provision and maintenance of public toilets. Provision in the city centre is poor, as is quality of maintenance. This is a difficult area and it is recognised there are problems with finding resources and also with vandalism. Nevertheless, current standards fall well short of what is required and this something that should be addressed as part of public realm strategy.

- Access to the river. Currently a neglected asset for the city centre and which has enormous potential for providing safe and pleasant walking/cycling routes, opportunities for public spaces and small scale commercial activity - adding to the experience of being in the centre. This again is something that needs to be addressed as part of the place-making strategy.

- Licensing of buskers and street entertainers and control of on-street drinking and roofless sleeping.

Action points

- Adopt and implement the findings of the Public Realm and Movement study currently underway.
- Put in place new arrangements for city centre management.

7.4 Management and leadership

This strand is concerned with putting the right structures and organisation in place in order to market and manage Bath effectively as a leading visitor destination. This is about devising ways to deliver a more integrated approach without simply creating additional layers of bureaucracy.

The aim is to link marketing and destination management more closely, see tourism as part of the wider picture, ensure that we are adopting a market-responsive but sustainable approach.

Key priorities are:

- Getting the right structures in place
- Securing additional funding
- Becoming more sustainable
- Pursuing an evidence based approach

7.4.1 Getting the right structures in place

To manage and market destinations effectively we need to have structures in place which harness the energies of both public and private sectors and which relate tourism to the wider picture. Compared to many destinations Bath is already ahead in having a single unitary authority responsible for the area and a functioning and a destination marketing organisation (BTP) in place, in which the Council plays an active role.

The main issues relate to the wider management of the destination, how BTP is linked into this and its future role. There are various options, examples of which exist in other places.

The idea of establishing a city centre management board and appointing a city centre manager is currently under discussion. The exact form of this has yet to be decided but the intention is that it will raise some funds from the private sector. The Council is also proposing to introduce neighbourhood delivery of environmental services which may result in greater flexibility at the local level and which could interface with this organisation.

Another option is to establish an independent city centre management organisation which would take over responsibility for all day to day city centre management, inward investment and tourism marketing services with a service level agreement with the local authority. This is the situation in Coventry with CVOne. (see box) . The company could also be given a remit to pursue wider responsibilities for sustainability and quality.

CVOne
CVOne is a NFP arms length company which brings together city centre manager functions and Coventry/Warwickshire Promotions into one body. Four years old, it is funded by the local authority to undertake city centre management functions under a SLA but also draws on private sector membership for marketing of wider area.

Activities include marketing, management, street cleaning, security, lighting, CCTV, inward investment, business strategy, licensing, and research. It also manages the BID (800 members) and has an economic development role in terms of attracting new retail operators.

It has core funding of £6.5m with other income of c£2m. Spending on marketing function is c£1.5-1.75m gross spend including staffing. There are 20 staff on the destination marketing side dealing with marketing, sales, pres/PR, IT, festivals/events, TIC (NB: not dissimilar to BTP)

There is a high level board of 12 with 2 seats from City Council. Other parties are appointed eg cathedral, university, property development chairman. The Board meets monthly with sub groups involving different sectors. Tourism membership is c100.

Our initial thoughts are as follows:

- Bath needs to get a stronger grip on city centre management if it is to deliver its aspirations for the public realm. This requires some form of organisation which is adequately resourced, has the flexibility to respond quickly and apply resources where they are needed. It must also engage with the private sector and have the support of the local community.

- The proposal to establish a city centre management board or separate company as a body responsible for overseeing the day to day management of the city centre is a positive move and widely used in other places. It is not the only option, however.

- There are arguments both for and against subsuming BTP in this new organisation. BTP has been successful in establishing itself as a marketing organisation and is generally thought to be doing a good job by its members. It is important this momentum and good will is not squandered in any re-organisation and that a strong relationship is maintained with the tourism sector.

- A closer working relationship with the Bath Festivals Trust is needed although it is recognised that the objectives of the two organisations are not identical.

- A stronger engagement and involvement with the retail and food and drink sector is desirable.

- There needs to be formal recognition of the importance of the Bath as a WHS and close links to the WHS management plan.

Action points

- *Establish new structures and organisation to improve the effectiveness of city centre management.*
- *Ensure that the work of Bath Tourism Plus continues.*

7.4.2 Securing additional funding

It is clear that improvements to the public realm and experience of visiting the city centre to meet both local and visitor aspirations will require additional funding over and above that which has been available in the past through the local authority. There is also a need to attract more funds for marketing activity if Bath is to its position in the marketplace. This requires some radical thinking. A key element in this is tapping into funds from the private sector which in turn will help secure or retain public sector funding.

There are a number of possibilities, all of which have pros and cons and some of which are already under examination at the time of writing.

- Planning gain from development sites through s106 agreements. This can be used for a variety of purposes but is dependent upon development coming on stream. There is also a long list of worthy candidates lined up for this funding and public realm projects may come some way down the list. A policy paper on the role of planning contributions is currently in preparation.

- It is interesting to note that a bed tax levied at a rate of 50p per night on hotels could raise c£400k pa. However, this would require primary legislation from central government to enable B&NES to levy it which is unlikely to happen.

- A ‘visitor payback’ scheme whereby voluntary contributions are levied on hotel, restaurant bills etc to be used towards conservation and environmental projects may have a place here, although it is unlikely to raise large sums.

- A Business Improvement District (BID) enables a business led company to to raise a compulsory levy on all businesses within a specified area, usually 1-2% of rateable value, collected by the local authority. This can only be brought into play after a ballot and with approval of a majority of businesses. It has to be reviewed after a set limited period and spending must be additional to that provided by the local authority. The BID in Bankside, London (see box) raises an annual budget of c£500k. This is a promising avenue as it would tie in all businesses. Plymouth provides another interesting example.

- A city centre management company could raise private sector funding from membership or participation by key stakeholders. This is unlikely to raise large sums but might secure enough for staffing or minor works. BTP raises c£60k from 367 members but also attracts income to support marketing activity.

Better Bankside BID, London
Covers an area of xx businesses south of the river from London Bridge to Blackfriars Bridge. This is a mixed use area of offices, restaurants and shops, industry plus some key visitor attractions along the river. Established in 2005, it levies a rate set at 2% of rateable value which amounts o £525k pa. This is collected on the BID's behalf by the local authority. The BID is established as an independent not for profit company with a business led board. Theme groups eg promotion, environment, cleaning etc help steer the programme of activity. Projects funded to date include events, hanging baskets, new litter bins, tree planting, open space enhancement and environmental improvements. .

Action points
- *Establish a new organisation to manage tourism and the City Centre capable of generating additional funding.*
- *Explore the feasibility of establishing a Business Improvement District to cover the City Centre.*

7.4.3 Becoming more sustainable

Sustainability should be a theme running through all the actions in the strategy rather than treated as an add-on. This involves thinking about activities in terms of their impact on the environment (local and global), the local host community, the visitors who come to Bath, and the local tourism industry that makes this possible. A key part of this is ensuring that the local community are not alienated from tourism in Bath but feel part of this.

Recommended approach:

Most of these are embedded elsewhere in the strategy but we highlight them here to show how this can be taken forward in practical terms. Many of these suggestions came out of the sustainability workshop. BTP should be responsible for taking a lead on many of these although action will generally require participation from other partners.

- Giving a BTP Board member special responsibility for championing sustainability and same with a member of staff. Signing up BTP to the SWT Green Tourism Business Scheme.

- Listening to community concerns, getting feedback from local groups on the existing situation and proposed projects, undertaking surveys and opinion polls from time to time to assess how people feel about tourism.

- Monitoring economic and environmental impacts on a regular basis (see above) but also looking at quality of employment, incidence of tourism spending and local employment.

- Promoting and monitoring take-up of action of the year and green tourism business awards (GTBS). Encouraging the use of local products and suppliers. Publicising success stories, identifying champions and considering award schemes to align with regional and national awards.

- Promoting travel by public transport and encouraging people, to leave their cars behind. Improving facilities and better information distribution about transport options.

- Measuring visitor satisfaction through the benchmarking survey and following up complaints.

- Considering establishing a local ‘visitor payback’ scheme with voluntary contributions levied by participating restaurants and hotels to support local environmental and WHS projects.

- Setting some measurable targets to align with regional KPIs .eg arrivals by public transport , seasonality, length of stay, reduced ecological and carbon footprint of tourism etc.

Action points

- *Identify ‘sustainability champions’ within BTP .*
- *Promote sustainable practices to the tourism sector.*
- *Examine all actions and activities and test against sustainability criteria.*
- *Include sustainability appraisal as part of annual BTP report.*

7.4.4 Pursuing an evidence-based approach

It is important that decisions about tourism are made on the basis of sound evidence and that activities are monitored for effectiveness. Without this sort of information it is difficult to justify decision making or measure progress. Bath is quite well served compared to many places and much of the activity mentioned below is already undertaken on a regular basis. This should continue.

Areas to pursue are :

- Performance of accommodation and attractions. Hotel occupancy of the higher level hotels is currently measured by the Bench Survey, SWT provide a broader guide to occupancy in the district. The visitor attractions group collects detailed information on visitor numbers to attractions.

- The accommodation stock. SWT hold information about the accommodation stock but it is badly out of date and far from comprehensive. Given that the supply of accommodation is a critical issue there is a case for monitoring changes in a more systematic manner and undertaking a full and comprehensive exercise every 3 years or so.

- Visitor survey. This is currently undertaken by SWT and has been carried out every 2 years. This is a valuable tool for recording visitor profile and particularly visitor satisfaction benchmarked against other places. This should be maintained although frequency could be dropped to every 3 years.

- Marketing activity. Monitoring use of website, impact of PR activity, take up of brochures, conference bookings etc.

- Economic impact of tourism. Currently SWT produce an economic impact analysis for the region on a local authority basis. This uses data derived from national surveys and produces visitor profile information for B&NES as a whole as well as estimates of spending and employment. This is a valuable resource and should be continued.

- Market intelligence. BTP should share market intelligence with its members and other stakeholders to build up a stronger picture about key markets and changing market requirements. This area is not well developed at present and more should be done to deepen understanding. This is partly about sharing research from other sources more widely but also about undertaking some specific new research, particularly exploring perceptions, triggers and motivations amongst particular groups. The non-visitor survey undertaken for this exercise is a start in this direction.

- Other visitor research. This includes visitor research on the Christmas Market, the Taste event, attendance at the Spa and the Roman Baths. These provide valuable evidence of the impacts of these facilities. Results should be shared as widely as possible.

- A further area where we think there is scope for improvement is in looking outward at the experience of other places, particularly historic cities in mainland Europe. BTP could act as a catalyst for this. This could take the form of:
  - Desk research and information
  - Study tours to specific places on an annual basis
  - A conference whereby delegates from other cities are invited to Bath to share their experiences.

Action points

- *Measure and monitor the scale and nature of tourism to Bath*
- *Record hotel occupancy and visits to attractions.*
- *Measure visitor satisfaction and feedback.*
- *Monitor the impact of marketing activity.*
- *Collate and disseminate market intelligence and research new markets.*
- *Benchmark Bath against other places and learn from experience elsewhere*

Bath Destination Management Plan

	Action points [1]	Lead	Others [2]	Timing (yrs) [3]	Resource implications [4]
1	MARKETING & COMMUNICATION				
1.1	Revisiting the Bath brand				
	• *Review the Bath brand*	BTP	B&NES, others	1-3	Depends on scale of initiative
	• *Review tourism messages in the context of the Bath brand*	BTP	SWRDA	ongoing	
1.2	Keeping Bath on the radar				
	• *Strengthen and co-ordinate PR activity*	BTP	T	Ongoing	Additional funding to create impact (L)
	• *Commission stronger and more striking visual images*	BTP	B&NES, T, C	Ongoing	Some cost involved (L)
1.3	Reviewing the market emphasis				
	• *Review current market priorities*	BTP		Ongoing	
	• *Identify and invest in market segments with growth potential*	BTP	T	Ongoing	Some additional costs
	• *Seek and justify additional resources for marketing*	BTP	B&NES, T	Ongoing	Yes (H)
	• *Feed priorities into annual marketing plan*	BTP		Ongoing	
1.4	Marketing the off-peak				
	• *Review marketing activity to emphasise the off-peak*	BTP		1-3	Additional cost (L)
1.5	Enriching the visit				
	• *Explore ways to promote the depth and range of the experience*	BTP		1-3	Additional cost (L)
	• *Identify target areas and work with different interest groups*	BTP	T, C	1-3	Additional cost (L)
2	TOURISM PRODUCT				
2.1	Increasing accommodation capacity & choice				
	• *Commission a hotel demand study for Bath*	B&NES	BTP	1-3	£25k

	Action points [1]	Lead	Others [2]	Timing (yrs) [3]	Resource implications [4]
2.1	• *Ensure accommodation priorities are reflected in the LDF*	B&NES	BTP	1-3	
	• *Contact hotel groups/developers to raise awareness*	B&NES	BTP	3-4	
2.2	Making history live				
	• *Use the Visitor Attractions Forum to communicate.*	BTP	HS, A	Ongoing	
	• *Develop Bath history overview and more integrated approach*	HS	BTP, A	3-4	Additional costs (L)
	• *Highlight the synergies with WHS management plan.*	BTP	HS, B&NES	1-3	
	• *Encourage innovation in presentation and interpretation*	HS	BTP, A	Ongoing	Additional costs (M)
2.3	Creating a lively,living city				
	• *Ensure that the LDF supports a lively mix of activities and independent offer*	B&NES	BTP, C	1-3	
	• *Identify and introduce appropriate management policies*	B&NES	CCMC, C	ongoing	
	• *Pursue the idea of attracting an appropriate Casino development*	B&NES			
	• *Support Bath Rugby in its desire to remain in the City Centre*	B&NES			
	• *Ensure that the marketing of Bath reflects the above*	BTP			
2.4	Making more of festivals and events				
	• *Undertake a detailed audit of current events and their impact.*	FF	BTP, BFT		Consultancy study? (L)
	• *Draw up a major events strategy for Bath*	BTP	FF, B&NES	1-3	Additional cost (L)
	• *Develop closer working relationships with festival organisers*	FF			
2.5	Planning for a new venue				
	• *Gather further information on similar scale venues elsewhere*	B&NES		1-3	
	• *Explore opportunities for incorporating a new venue in proposed developments*	B&NES	C	Ongoing	
2.6	Strengthening the rural product				
	• *Ensure that the LDF supports tourism development in rural areas.*	B&NES	BTP	1-3	
	• *Establish and promote itineraries*	BTP		Ongoing	Additional costs (L)
	• *Encourage the development of small attractions, activities, acom.*	B&NES	BTP	Ongoing	

	Action points [1]	Lead	Others [2]	Timing (yrs) [3]	Resource implications [4]
3	INFRASTRUCTURE & ENVIRONMENT				
3.1	Making it easier to get in and out of Bath				
	• *Draw up a visitor parking and (traffic) signage strategy*	B&NES	BTP, TS	1-3	
	• *Develop a proactive coach management strategy*	B&NES	BTP, TS	1-3	
	• *Produce more information for visitors on public transport*	B&NES			
	• *Provide orientation material at all entry and arrival points*	B&NES	BTP	3-7	Additional costs (M)
3.2	Better signage and information				
	• *Design and implement a new wayfinding scheme*	B&NES	BTP, CCMC	3-7	Significant costs (H)
	• *Develop an information a training scheme for front line staff*	BTP	TS	3-7	Additional cost (L)
	• *Encourage closer working between information centres*	BTP	C	1-3	
3.3	Improving the look and feel of the city centre				
	• *Implement the findings of Public Realm and Movement study.*	B&NES	CCMC	3-4	Significant costs (H)
	• *Put in place new arrangements for city centre management.*	B&NES	C	1-3	Additional cost (M)
4	MANAGEMENT & LEADERSHIP				
4.1	Getting the right structures in place				
	• *Establish new structures for city centre management.*	B&NES	C/SWT/SWRDA	1-3	
	• *Ensure that the work of Bath Tourism Plus continues.*	BTP		Ongoing	
4.2	Securing additional funding				
	• *Establish a new organisation capable of generating additional funding.*	B&NES	C	1-3	
	• *Explore the feasibility of establishing a BID*	CCMC	C, B&NES	3-4	
4.3	Becoming more sustainable				
	• *Identify ‘sustainability champions’ within BTP .*	BTP	SWT	1-3	
	• *Promote sustainable practices to the tourism sector.*	BTP	TS/SWT	ongoing	Some additional cost (L)
	• *Examine all actions against sustainability criteria.*	BTP	SWT	Ongoing	
	• *Include sustainability appraisal as part of annual BTP report.*	BTP	SWT	Ongoing	

	Action points [1]	Lead	Others [2]	Timing (yrs) [3]	Resource implications [4]
4.4	Pursuing and evidence –based approach				
	• *Measure and monitor the scale and nature of tourism to Bath*	BTP	SWT	Ongoing	Additional cost (L)
	• *Record hotel occupancy and visits to attractions.*	BTP	SWT	Ongoing	Additional cost (L)
	• *Measure visitor satisfaction and feedback.*	BTP	SWT	Ongoing	Additional cost (L)
	• *Monitor the impact of marketing activity.*	BTP	SWT	Ongoing	Additional cost (L)
	• *Collate market intelligence and research new markets.*	BTP	SWT	Ongoing	Additional costs (M)
	• *Benchmark Bath and learn from experience elsewhere*	BTP	SWT	Ongoing	Additional costs (L)

Footnotes:
(1) See main text for more detail
(2) BTP-Bath Tourism Plus, B&NES - Bath & NE Somerset Council, TS – tourism sector, C – commercial imterests, HS – Heritage Services, FF – Festivals Forum, CCMC – City Centre Management Company, BFT – Bath Festivals Trust.
(3) 3 phases: 1-3 yrs, 4-6 years, 7-10 years.
(4) Assumed that costs of initiatives can be largely met from existing resources. Additional costs identified. L < £10k, M - £10-50k, H >£50k.