

# Royal Borough of Windsor & Maidenhead

## Tourism Action Plan 2017 - 2020



### FOREWORD

During the timeline of the previous strategy, there was a predominant concentration on the London 2012 Olympic and Paralympic Games; both in delivery and realising opportunity. It created a focus for all parties to collectively deliver success and, while as a destination Games time can't be replicated, the Royal Borough can learn from the power of collaboration.

The Visitor Management and Marketing team were instrumental in achieving 80% of the strategy actions. It has focused continuously on improving quality for visitors, facilitated by the knowledge and networks it has built with local and national partners.

UK wide, we are no longer operating in an environment of strong financial support for tourism. Since the demise of Regional Development Agencies and devolution of power to a local level, Local Authorities make individual decisions on the resources dedicated to the non-statutory function of Visitor Management.

The Royal Borough of Windsor and Maidenhead (RBWM) places a high priority on tourism, however with more urgent challenges, the future delivery of tourism can only be successful with a stronger private sector role; beyond consultation and discussion; acting at the heart of delivery.

A number of individual businesses in the Borough are strong iconic brands in their own right and help to support many micro businesses. The reality is, a step change is required to achieve real term growth, where more businesses contribute and more gain.

There is an industry acceptance that not all challenges and opportunities can be addressed and resources therefore will be focused on a limited number of actions that produce the greatest return. The creation of industry-led task groups will provide a clear direction and momentum for change.

## Executive Summary

The 2008 strategy provided clear objectives and a comprehensive action plan to increase expenditure from £380 million in 2006 by £445 million per year by 2016.

Over 80% of actions were achieved or partly achieved; contributing to a total visitor spend in 2015 of £485 million. The Visitor Management and Marketing Team played a significant operational role, connecting people to the tourism product, through information, marketing, PR and training.

An analysis of data for the period 2011-2015 (Tourism South East) shows that;

- The volume of trips and nights has increased since 2011, with both domestic and overseas visitor nights on an upwards trend
- The RBWM expenditure figures for 2011-15, broadly shadow the level of inflation

In 2015

- Day visitors contributed 56% of expenditure. 63% of expenditure was on food & drink and shopping
- The average spend per night was £105 for domestic visitors and £107 for overseas visitors
- The industry supported 7157 FTE jobs

Visitors continue to rate Windsor highly as a welcoming and atmospheric destination and are 'very likely' to recommend to others. The cost and ease of parking remains a visitor concern, along with perceptions of an overcrowded environment scoring lower than other factors.

Looking ahead there are a number of challenges and opportunities within and beyond tourism, including; the decline in the RBWM tourism budget, the uncertainty of leaving the European Union, US President policy direction and the threat of terrorism remains high.

The analysis of the last five years continues to demonstrate the destination's vulnerability in changing circumstances and highlights potential opportunities for both the leisure and business tourism markets. The quality of tourism data needs to be addressed in terms of accommodation occupancy data, a Borough-wide visitor survey and expenditure data adjusted for inflation.

Five quality themes remain valid from the previous strategy; Travel & transport, Product development, Marketing, Information and People.

This strategy identifies the objectives that remain relevant and sets out clear recommendations for delivery under the quality themes:

- To ensure that visitors to the Borough can get in, out and about with ease
- To provide and influence the use of appropriate alternatives to car travel
- To ensure our product meets the needs of loyal visitors as their demands change, as well as meeting the needs of new visitors in emerging markets
- To rebrand Windsor to ensure its proximity to London and Heathrow is understood
- To reposition the destination as 'family-focused'
- To provide accessible, accurate and appropriate information that puts the needs of the visitor first and to facilitate information among the local tourism industry
- To ensure frontline staff act as proud ambassadors, understand the needs of visitors and are knowledgeable about the destination

The overall goal for 2017-20 remains to deliver real terms expenditure growth. As in the last strategy, the focus should remain on getting overseas and domestic holiday makers to stay overnight in the Borough and attracting the potentially lucrative business tourism market.

## 2. TOURISM STRATEGY 2008-16: A BRIEF LOOK BACK

In our 2008 strategy, our vision for 2016 set out clear objectives, grouped into 6 quality themes, together with an action plan for delivery. The overarching goal was to increase expenditure from £380 million in 2006 by £45 million per year by 2016.

### 2.1 The Visitor Management and Marketing Team

As we look back in 2017, we can see that an impressive 80% of the planned actions were delivered or partly delivered<sup>1</sup>, including successfully hosting the rowing and flat water canoe events as part of the London 2012 Olympic and Paralympic Games.



The Visitor Management and Marketing Team within RBWM have been instrumental in that delivery. It has focused continuously on improving quality for visitors, facilitated by the knowledge and networks it has built with local and national partners.



The Visitor Management and Marketing Team has played a significant operational role, connecting people to the tourism product, through information, marketing, PR and training. This has included;

- Generating PR reaching 290 million people worldwide, since 2011, with a value of £4.3 million
- Developing a website which generates 1.2 million unique visits annually
- Producing the printed guides with a print run of 300,000 copies
- Training and deploying 210 local ambassadors

In 2015, the gross cost of this operational activity was £484,000, with £363,000 contributed by the industry and £121,000 contributed by the local authority.

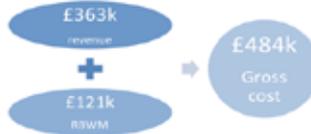
<sup>1</sup> As with any plan circumstances changed over time and the plan was adjusted accordingly

# INVISIBLE MAGIC

## KEY FACTS & FIGURES ABOUT RBWM

RBWM plays a pivotal role in managing complexity within a fragmented system.

- It blends research & analysis, vision & learning to continuously improve quality and set a strategic direction for tourism in RBWM.
- It builds knowledge and networks with local and national partners.
- It plays a significant operational role, connecting people to the tourism product, through information, marketing, PR and training.



## STRATEGIC LEADERSHIP



IF YOU DON'T KNOW WHERE YOU ARE GOING: ANY WAY WILL DO

### RESEARCH & INTELLIGENCE



Economic Impact Studies  
Windsor Visitor Surveys

### ACTION PLANNING & DELIVERY



**80%** of 2008  
Strategy actions delivered.

## KNOWLEDGE & NETWORKS



## OPERATIONAL DELIVERY

### INFORMATION

**1.2m** UNIQUE  
WEBSITE  
VISITS  
YEARLY

**90,000**  
VIC VISITS  
8,500 CALLS



PRINTED GUIDES  
300,000  
COPIES

### PR

Reaching	290m
Costing	£100k
Value	£4.3m
Press Trips	135

### TRAINING

**210**

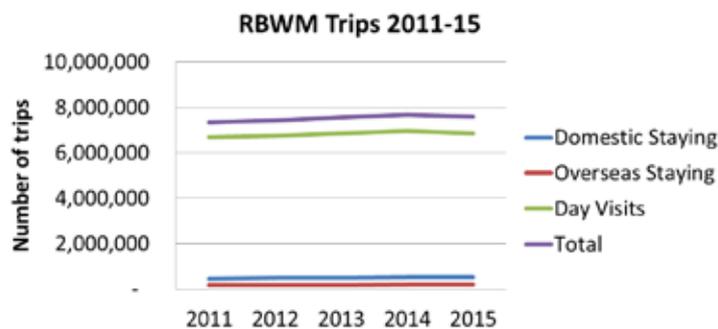
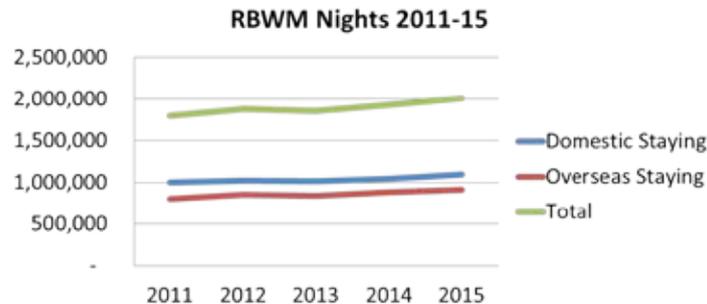


Local ambassadors trained

## 2.2 The Dimensions of Tourism in Windsor & Maidenhead in 2015

Due to changes in national tourism survey methodologies in 2011, (which provide data on trips, nights and expenditure) it is not possible to fully evaluate how expenditure has changed from the starting point of £380 million in 2006.

Nevertheless, we do know that the volume of trips and nights has increased since 2011, with both domestic and overseas visitor nights on an upwards trend. This demonstrates the continuing appeal of what the Borough has to offer and its strength as a global iconic brand.



In 2015, visitors to the Borough spent £485 million on tourism, with day visitors contributing 56% of expenditure. 63% of expenditure was on food & drink and shopping. The industry supported 7157 FTE jobs.

Domestic Staying Visitors	114,961
Overseas Staying Visitors	97,506,000
Day Visitors	273,300,000
Total Spend	485,767,000

Accommodation	75,746,000
Shopping	157,827,000
Food & Drink	146,193,000
Attractions & Entertainment	45,805,000
Transport & Travel	60,196,000
Total Spend	485,767,000

The average spend per night was £105 for domestic visitors and £107 for overseas visitors, which is significantly higher than visitors elsewhere in the South East and all England.

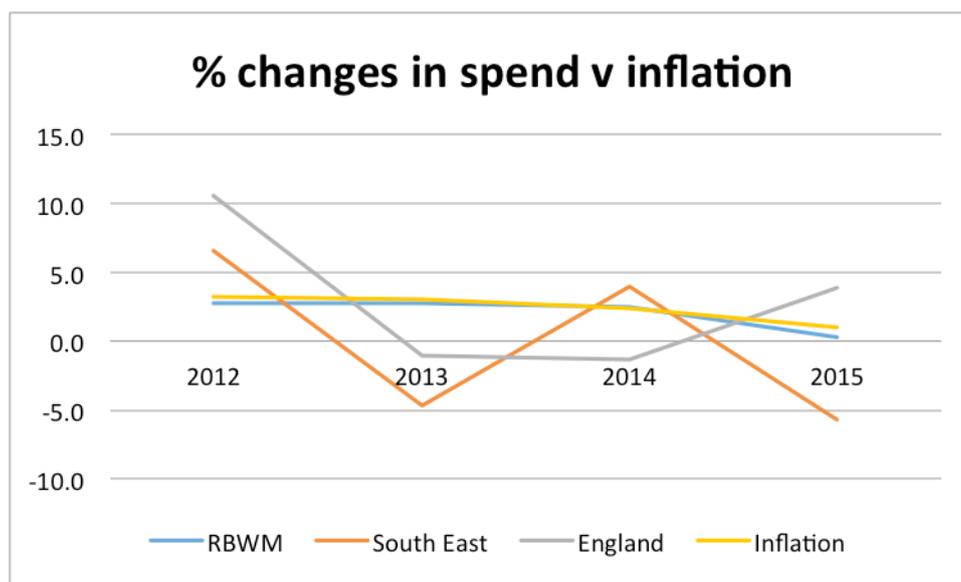
The table below shows how expenditure has changed in nominal terms since 2011.

	2011	2012	2013	2014	2015
Domestic Staying	99,629,000	102,920,000	110,940,000	114,741,000	114,961,000
Overseas Staying	83,179,000	90,020,000	90,648,000	93,264,000	97,506,000
Day Visits	265,108,000	267,107,000	271,108,000	276,387,000	273,300,000
Total Spend	<b>447,916,000</b>	<b>460,047,000</b>	<b>472,696,000</b>	<b>484,392,000</b>	<b>485,767,000</b>
% change on prior year		2.7%	2.7%	2.5%	0.3%

**Source:** Tourism South East (2011-15) The Economic Impact of Tourism Windsor & Maidenhead 2011-2015.

The chart below shows the year-on-year % change in nominal spend figures for RBWM, the South East and England, mapped against the annual rate of inflation. The RBWM spend figures broadly shadow the level of inflation whilst there is greater volatility in the South East and England.

An important consideration for the industry remains how to deliver real terms, above inflation, increases in expenditure. A significant challenge to this is the growing 'discount' culture, where consumers no longer expect to pay full price, in particular where wage increases and disposable income are not keeping pace with inflation.



**Sources:** Tourism South East (2011-15), Visit England (2016), Tourism South East (n.d.), Office for National Statistics (2017)

## 2.3 The Views of Visitors

As well as the value and volume of visits, the annual Windsor Visitor Survey provides insight as to visitors' views on the quality of their experience.

The key findings from a review of the surveys from 2011 to 2015 (Tourism South East Research) were:

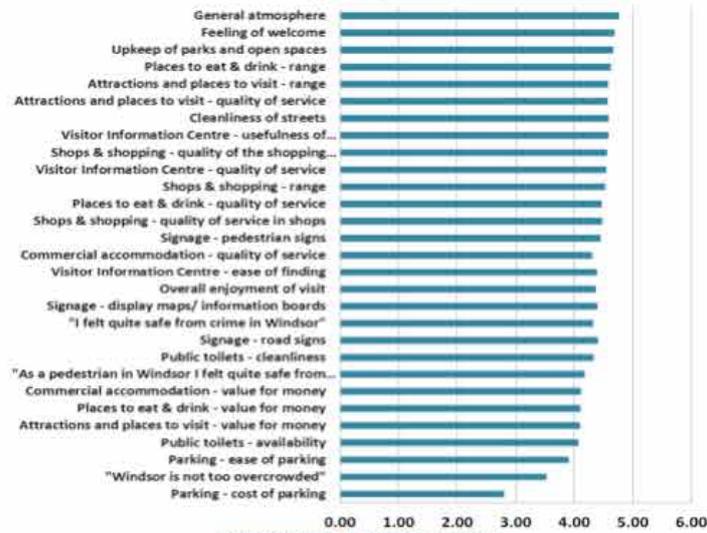
- Visitors rate the atmosphere and the feeling of welcome highly, but the cost and ease of parking is an issue
- Windsor consistently meets and exceeds visitor expectations (98% of visitors in 2015)
- Visitors to Windsor are 'very likely' or 'likely' to recommend it to others (97% in 2015)
- Perceptions of an overcrowded environment consistently scores lower than other factors
- 50% of visitors were not conscious of which media channel had motivated them to go
- Adult only groups represent 70% of visitors
- The number of first time visitors to Windsor is increasing

It should be noted that this is based on a survey of approximately 400 participants, taken between June and September in key locations in Windsor. This raises the question of how the survey could be extended to increase participation throughout the year and across the Borough as a whole, to give greater insight. The findings also raise important questions about the sustainability of the destination if visitor numbers continue to rise and spend decrease, the best channels for attracting visitors and who the key target audiences are.

# Windsor Visitor Survey 2011-16

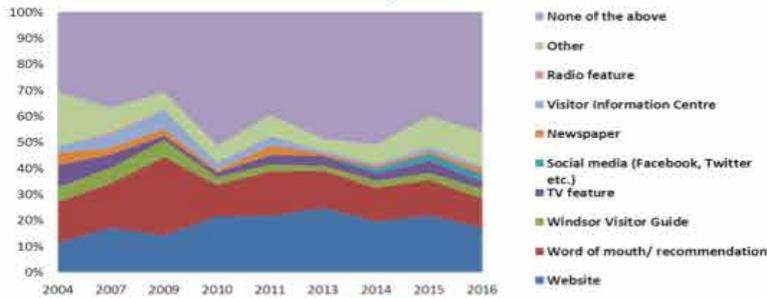
## VISITOR OPINIONS

Visitor Survey Average Score 2011-15



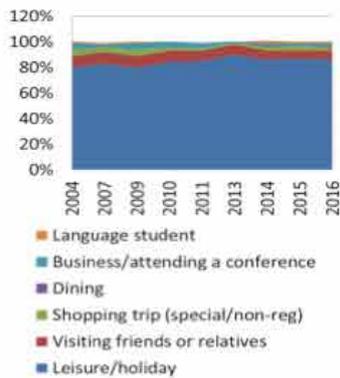
## MARKETING & MOTIVATION

Information prior to visit

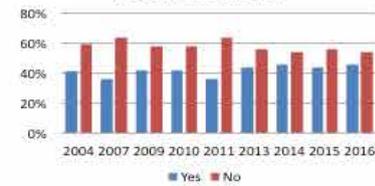


## PROFILE

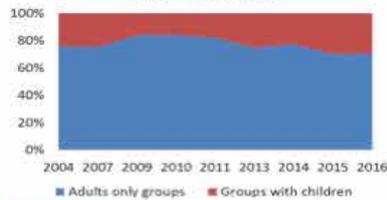
Reason for visit



First visit to Windsor

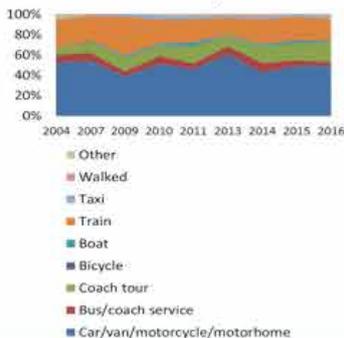


Group composition

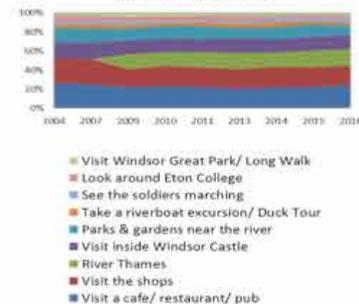


## CHARACTERISTICS

Mode of transport



Attractions (10%+)



### 3. LOOKING AHEAD

Whilst the industry has clearly been successful to date, and the area has a wealth of assets to offer the visitor, there are some challenges and opportunities ahead within and beyond tourism.

- **Booking behaviours** - Consumers booking last minute isn't a short-term trend; desire for 'a deal' is predicted to continue through this decade
- **Unregulated enterprise** - e.g. Airbnb competing with stringently regulated 'official' tourism businesses. Consumers influenced by price and possibly 'blind' to the safeguards 'official' businesses provide.
- **Tourism structures** - The structure of economic development and tourism continues to change; the emergence of Visitor Economy driven Local Enterprise Partnerships (currently limited in SE), Destination Management Organisations are disparate and multi-faceted. They are varied in structure. They might be public sector bodies such as local authorities with definitive boundaries, private companies, or partnerships between the public and private sector working across various geographies.
- **'Talent deficit'** - Human capital challenges are greater to the travel and tourism industry than any other sector
- **Brexit** - Leaving the European Union could create opportunities for growth, such as cutting red tape and forging partnerships in new and developing markets. Domestic and inbound tourism can benefit from the weaker pound; 8 out of top 10 visiting nationalities are European. Growth prospects are still more about 'the local shock of Brexit' than the USA election results.
- **Inauguration of new US President** - We are in unknown territory. Dollar initially slumped; recovered quickly. Uncertainty about policy direction.
- **General global uncertainty** - Brexit could be a catalyst for other European Countries to follow suit creating economic uncertainty
- **Safe and secure** - The threat of terrorism remains high. Following Paris, Brussels, Nice and Berlin, consumers remain wary of travelling.
- **Social media** - Provides a customer service communication channel. The 'Crowd Wisdom' combined with recommendation has a powerful influence on decision making.

## 4. STRATEGY 2017 - 20

### 4.1 Purpose

Good strategy is 'live' and iterative; it should be subject to constant review. The purpose of refreshing the strategy, rather than developing a new one, was to do just that. It was about ensuring that it remains on track and the actions being taken will contribute to achieving future goals.

The recommendations in this section of the report are the next steps towards improving Windsor and Maidenhead as a tourism destination. In some instances, they will not directly achieve the overarching goals, but will illuminate the way forward. They will also need to be subject to continuous review.

Good strategy can also be described as a blend of vision, analysis, and learning from experience.

- The vision remains valid and appropriate for 2017-20
- The industry sector groups provide an excellent mechanism for learning from experience
- A substantial amount of data has been analysed to assess performance to date. This has also highlighted some significant gaps which need to be addressed to move forward. These are around accommodation occupancy data, visitor views and expenditure data.

### 4.2 Process

RBWM consulted with industry partners about the future direction for tourism in the Borough during a series of workshops in December 2016. This was based on a detailed review of the historic data highlighted in section 2 and future outlook set out in section 3. The detailed data analysis and summary of strengths, weaknesses, opportunities and threats can be found as appendices.

The discussions are summarised below, together with the directions that emerged under each of the five quality themes of the 2008-16 strategy. These will continue for 2017-2020.

### 4.3 Resources

The RBWM Visitor Management Team adds significant value to the industry in terms of providing strategic leadership, creating knowledge and networks and operational delivery. The national context of reductions in local authority funding means that support is unlikely to be increased as tourism is not a statutory service.

With this in mind, the local authority may be able to maintain the quality of the visitor experience, but would need additional resources to be able to make significant strategic improvements. Additional resources could be identified through:

- The submission of an application to the Discover England Fund or other external grants
- The power of collaboration - Industry partners need to work together to grow the market overall, rather than individual businesses competing for an increasing share.
- The development of a 'formal' partnership e.g. Destination Management Organisation – public/private sector partnership

## 4.4 Our Vision

### A glimpse of the future JOURNALIST'S REVIEW

We arrived by boat. Not my choice thanks to memories of a cold, wet canoeing trip in Scotland. But this was different. Would you believe, stylish, glamorous and calm?

Thanks to the London Olympics, Windsor now offers 'park and glide' arrivals so we visitors can float physically and mentally to our holiday destination.

For years our family has dithered about where to holiday. We need somewhere to appeal to two grandparents, six adults aged 40-something and nine children ranging from terrible toddlers to picky adolescents. We wanted (needed!) a four-day break and picked Windsor because public transport connections are easy and I wanted to see Windsor's much-praised new look. Windsor and Eton did not disappoint. The town has a stylish, contemporary feel that complements its historical past. It was spruced up for 2012 and locals and visitors have been enjoying the benefits. You can always judge the success of a town's renaissance by the contentment of locals. Windsor shines and welcomes its visitors with open arms.

We spent our first morning moseying around the town centre. It felt special and very 'Windsor', thanks to a mix of shops - many of them independent one-offs. Pedestrians have reclaimed the town centre and there's none of that tiresome congestion we suffer in other towns. Windsor is compact so it's easy to take in both town and countryside in one day. A hopper bus connects the main places of interest.

Every moment is precious on holiday – especially short breaks with different ages and outlooks to please. At the Tourist Information Centre it felt as if someone had phoned ahead to say we were coming. We found a good choice of concise self-guided itineraries tailored to how long we were staying, our varied interests and our ages. All the tedious, hard work of planning was sorted.

So how did we spend our time? Windsor Castle, of course and LegoLand. But perhaps the real thrills were the unexpected gems we came across. You can explore by boat, on foot, by bus and by bike.

We loved both the Stanley Spencer Gallery in Cookham and Dorney Court. At Windsor Great Park the oldies went to the unique Savill Garden. The kids and parents potted around this impressive - and pretty historic! - landscape on hired bikes. We walked along the river – very 'Wind in the Willows' - and we explored the ancient woodland of Burnham Beeches. We also sipped cocktails (fresh juice for the kids) at Windsor Racecourse.

We only once got lost. I own up to dodgy map reading but a local 'Ambassador' (another legacy of the Olympics) saved the day by recommending a family-friendly pub where the gastro snacks were sublime.

It's easy to see why the region is now the UK's top spot for food and wine. We went to Bray one evening for a blow-out meal. Another night a local chef came to our lodge and cooked for us. Holiday heaven! When we booked we were simply asked how many people, how many rooms and with what sort of beds. Bliss for all us non-nuclear families. We chose. They made it happen.

So top marks to Windsor. Next year? You guessed it. No more arguing in overcrowded, overpriced honey-pots for us. We'll be canoeing our way back to Windsor.

## **4.5 Strategic Goals**

As with the 2008-16 strategy, the overall goal remains to deliver real terms expenditure growth. This needs to be done in a way which:

- Maximises the benefits of tourism for the local community (e.g. in terms of job creation)
- Minimises the impact on the community (e.g. in terms of congestion and overcrowding)
- Creates a destination with visitor numbers that can be accommodated within the local infrastructure
- Creates a sustainable destination with visits year-round

As in the last strategy, the focus will remain on getting overseas and domestic holiday makers to stay overnight in the Borough and attracting the potentially lucrative business tourism market.

### **4.5.1 Overseas Holiday Makers**

The destination has a brand and range of events with a global appeal and particular resonance with USA, China, and Australia. Spend by overseas visitors increased in real terms between 2011-2015, with average spend per night by overseas visitors to RBWM exceeding average spend for all visitors in England and South East.

There will be some uncertainty as the overseas tourism market remains vulnerable to security fears. Also, the US election results may continue to affect the dollar exchange rate. Nevertheless, the falling value of the £ makes the UK good value for money for overseas visitors. Countries that visit Windsor are in the top 20 markets for projected growth between 2011 and 2020. Chinese visitors featured in the top 10 for the first time in 2016; potential UK growth is forecast to increase visits by 157% and £378m spend .

### **4.5.2 Domestic Holiday Makers**

Trips by domestic staying visitors have increased in the last 5 years while spend remained constant in real terms, perhaps reflecting a growing discount culture, where visitors hunt around for the best price. While Windsor is home to many young professionals, in terms of visitors to Windsor, the 55+ group predominate, suggesting an opportunity to remarket what is on offer.

As the volume of day visits continues to increase, the obvious strategy to address a decline in day visitor spend would be to seek to convert them into staying visitors. If the £ remains weak, and there is continuing uncertainty around Brexit, then domestic consumers may well seek holidays that provide good value for money in the UK.

### 4.5.3 Business Tourism

Data shows that there was a significant increase in the number of business tourism trips between 2008 – 2015 (94,000 to 227,000). The proximity to Heathrow makes it an ideal focus for international/domestic conferences. However, we do not have data to be able to analyse how spend has changed during those years. Following the 2015 Comprehensive Spending Review (CSR) VisitBritain and VisitEngland are refocusing their support for Business visits and Events. There is an opportunity to tap into a potentially lucrative market that could be further expanded.

### 4.5.4 Measuring Success 2017-20

The table below summarises the key measures that will be used to monitor progress in delivering the outputs and outcomes. The rationale and details are explained in Section 5.

<b>Overarching Goals</b> <ul style="list-style-type: none"><li>● Real terms increase in expenditure by staying visitors</li><li>● Number of staying visitors increases and day visitors declines as day trips are converted into staying visits. Overall number of visitors remains stable</li><li>● Increase in FTE jobs created</li><li>● Positive visitor perceptions of general atmosphere and overcrowding</li></ul>
<b>Strategic Framework</b> <ul style="list-style-type: none"><li>● Provision of occupancy data</li><li>● Establishment of a Borough-wide visitor survey</li><li>● Provision of annual expenditure data that is adjusted for inflation</li></ul>
<b>Travel and Transport</b> <ul style="list-style-type: none"><li>● Number and proportion of visitors arriving and travelling within the destination by private car decreases</li></ul>
<b>Product</b> <ul style="list-style-type: none"><li>● Family-friendly product development initiatives delivered</li><li>● New business tourism opportunities identified</li></ul>
<b>Marketing Messages</b> <ul style="list-style-type: none"><li>● Refocused marketing messages delivered</li></ul>
<b>Information</b> <ul style="list-style-type: none"><li>● Increase in number of unique visitors to the website</li><li>● Increase the number of visitors assisted in the Visitor Information Centre</li><li>● Increase in the number of products booked through the Visitor Information Centre</li><li>● Increase in media coverage</li></ul>
<b>People</b> <ul style="list-style-type: none"><li>● Increase in number of apprenticeships in RBWM</li><li>● Number of events per year that have Ambassador support</li></ul>

## 5. THE STRATEGIC FRAMEWORK

Before considering the quality themes, there are three areas that need to be addressed to improve the quality of tourism data. While they will not directly achieve the goals, they are critical in terms of providing better knowledge, illuminating the way forward and supporting ongoing decision making:

- The provision of accommodation occupancy data. This is fundamental if the overall strategy is to encourage more visitors to stay. While it is recognised that this information is commercially sensitive for individual accommodation providers, a means needs to be found of determining when and where capacity exists, to support marketing and information to consumers.
- The establishment of a Borough-wide visitor survey. The current visitor survey is focused on Windsor and takes place between June and September, based on approximately 400 visitors. There is a need to extend the survey so that it covers the wider Borough, the tourism shoulder season and is based on an increased sample size. This could be achieved by industry partners distributing a survey to their databases. There is also the opportunity to review the content to ensure it provides meaningful information.
- Expenditure data; if the overall goal is to achieve real terms expenditure growth, the yearly expenditure data needs to be adjusted for inflation to give an accurate picture of progress

Information sharing across the industry is one of the 20% of actions not achieved previously.

The analysis of the last five years continues to demonstrate the destination's vulnerability in changing circumstances and highlights potential opportunities for both the leisure and business tourism markets.

Do we have the accommodation capacity to grow staying visitor numbers?

How do the Borough's occupancy levels compare to the South East and England?

It is recommended that an industry-led Strategy Steering Group is established to;

- Oversee delivery of the strategy as a whole
- Address the data issues identified above

## 6. QUALITY THEMES AND SUMMARY RECOMMENDATIONS

### 6.1 Travel & Transport

There are two objectives from the previous strategy:

- To ensure that visitors to the Borough can get in, out and about with ease
- To provide and influence the use of appropriate alternatives to car travel

Responses to the Windsor Visitor Survey over the last 10 years highlight the availability and cost of parking as an issue for visitors. The number of trips is increasing and numbers of visitors arriving by car is increasing. At the same time the take up of park and ride facilities is low. This may be due to its limited availability, signage issues and absence of a cultural expectation that this is the best way to visit Windsor. There are also concerns about the future of the coach park, which mainly serves Windsor Castle. A brief review of information about getting to RBWM does not highlight the proximity to Heathrow airport (7.2 miles away) or the excellent train shuttle service from Slough just 6 minutes away.

There is a risk that some overseas visitors are deterred from staying in RBWM because they perceive it to be easier to travel into central London, losing potential revenue. There is also a risk that if the number of visits continues to rise without more visitors using public transport, RBWM will become overcrowded, to the detriment of the visitor experience.

Since 2008, the Borough has developed a Local Transport Plan 2012-2026, which acknowledges the local impact of nearly 7 million tourist visits and the range of measures required to minimise it. It highlights in particular the importance of improving public transport access to Heathrow to deliver sustainable economic growth.

#### Recommendations

A holistic approach to travel and transport is needed. It is recommended that an industry-led task group;

- Reviews the travel and transport information provided on <http://www.windsor.gov.uk/> to ensure that it minimises the level of research required by consumers and maximises the likelihood of travel by public transport
- Encourages individual tourism businesses to provide consistent information on travel and transport that encourages travel to and around the Borough by public transport
- Proactively contributes to projects designed to make Heathrow more accessible (e.g. the Last Mile (VisitBritain)/Heathrow Shuttle) to ensure that they are delivered
- Continues to ensure that the needs of tourists are understood in local decisions about Park and Ride facilities and the coach park
- Develops the moral and environmental arguments around driving to a culturally rich and historic destination. The Royal Borough can learn from examples such as Bath
- Supports the work of the marketing task group to encourage staying visitors in order to minimise car movements

**Lead stakeholder:** Ben Smith, Head of Highways & Transport, RBWM

## 6.2 Product

This is the objective from the previous strategy:

- To ensure our product meets the needs of loyal visitors as their demands change, as well as meeting the needs of new visitors in emerging markets.

The Royal Borough continues to offer a range of iconic brands and events with global appeal – LEGOLAND Windsor, Royal Ascot and Windsor Castle, to name a few. Windsor Castle remains a key attractor to the destination (over half of visitors state it is the main reason for visiting). Consistently over the period this strategy analyses, adult-only groups remain the dominate visitor profile (70% in 2015 compared to 82% in 2011). Groups with children are however steadily rising; from 18% to 30%.

Feedback from the strategy consultation groups suggested that the destination is not confident in its ability to appeal to the family market beyond LEGOLAND Windsor. Yet individual attractions and accommodation providers clearly have products that are very well suited to the family market. Is this perception or reality? Do restaurants provide 'small appetite' quality ingredient menu choices, does information offer families what they need e.g. advice on the best place to stand to view Changing the Guard and do park and ride facilities understand the complexity of family transport challenges? Could it be the attention to detail the destination is missing or visitor awareness and confidence?

There is a risk that the destination will continue to be predominantly a day visitor destination rather than being able to transform itself into a family-focused short-break destination that benefits the wider tourism industry. A further threat is the number of nights visitors are staying is in decline (avg. 4.7-3.3). Value for money of attractions and places to visit also continues to be rated less favourably by visitors, than other attraction indicators.

With visitors from China appearing in the top 10 visiting countries for the first time, there is clear progress being made and opportunities arising. The Royal Collection's 'Future Programme' will see significant investment in the families' market at Windsor Castle from 2018 supporting the profile; Windsor a family destination.

In 2016 VisitEngland announced a new focus on 'creating world class bookable products', providing the Royal Borough with the opportunity to create strong content, with a family focus and capitalise on the marketing and promotional activity VisitEngland undertakes.

The Royal Borough and surrounding area provides a range of conference and meeting venues. Feedback from the consultation meetings highlighted the need to refocus on the business market.

## Recommendations

### Family

- Produce a family friendly product audit
- Develop family business support toolkit
- Industry-led marketing task group to identify key marketing messages (Section 6.3)

## 6.3 Business and Events

- Develop key sales and marketing messages to attract corporate business and meetings, incentives, conference and events, for key domestic and overseas markets
- Exploit opportunities through VisitEngland's 6 key areas: Product/event development and bid support; provision of international sales and marketing platforms; direct national government support; advocacy for business events; research and insights; understanding and sharing global best practice

### Lead Stakeholder

Families - LEGOLAND Windsor

Business and Events – Visitor Management and Marketing Team RBWM

## 6.4 Marketing Messages for Staying Visitors

The objectives from the previous strategy have been refocused as follows:

- To rebrand Windsor to ensure its proximity to London and Heathrow is understood
- To reposition the destination as 'family-focused'

If we want visitors to stay, then we need to rethink some of the marketing messages that are being used to attract them. The lack of information on occupancy needs to be addressed as a first step towards this.

There is a concern that visitors from overseas (including those coming to the UK for business) do not appreciate the proximity of Windsor to Heathrow (7.2 miles) and consider it easier to use London hotels as a base. This suggests an opportunity to reposition the destination to make its proximity to London much clearer.

Whilst the Windsor visitor survey shows that in terms of visitors, the 55+ group predominate, we know that Windsor is home to many young professionals. As highlighted in Para 6.2, the destination is not confident in its ability to appeal to the family market beyond LEGOLAND Windsor, despite a number of products that are well suited to this market. Furthermore, in 2018, Windsor Castle will enhance its provision for families as part of its investment in its 'Future Programme' launch. Along with other tourism businesses, this suggests an opportunity to reposition as a family-focused destination, for both short-breaks and longer holidays. The strategy objectives need to be amended accordingly.

Currently, marketing is reliant on joining external campaigns because of limited resources. Looking ahead there is an opportunity to bid for external funding through the England Development Fund or encourage individual businesses to collaborate to co-develop marketing messages in order to grow the market overall.

VisitBritain forecasts that the markets that have grown the most since 2006 will still be of limited value by 2020. The majority of growth in visit and value will be from established markets. The key markets identified by VisitBritain and with the propensity to visit Windsor are: USA, Australia, Germany, France. (France, Germany, Spain and USA generate around a third of visits and spend, they are therefore very lucrative to Britain).

VisitEngland has revised its approach to market segmentation, adopting an approach based on different needs, attitudes and behaviours. The two domestic pen portraits closest to the Borough's product and strategy are Country-loving traditionalists and Aspirational family fun.





Source: VisitEngland (2016)

## Recommendations

It is recommended that an industry-led task group is established to focus on marketing to domestic and overseas visitors, with terms of reference to include:

- Confirming the updated marketing objectives
- Bidding into the £40m Discover England Fund to address some of the marketing weaknesses
- Rebranding Windsor as 'London's Country Estate' or similar for visitors (including business visitors)
- Developing marketing messages that promote Windsor as a family-focused destination
- Confirming the focus of overseas markets and segments in line with VisitBritain that RBWM has most potential to attract, based on the product offer
- Working with Thames Valley Chamber of Commerce and UKTO as an excellent local resource.

## Lead Stakeholder

Ascot Racecourse

## 6.5 Information

This is the objective from the previous strategy:

- To provide accessible, accurate and appropriate information that puts the needs of the visitor first and to facilitate information among the local tourism industry.

Significant investment was made in Windsor.gov to support this objective. 89% of visitors using the site rated the information resource as 'good to very good'.

The Windsor Visitor Survey has consistently identified that 50% of respondents are not consciously using any information channel before visiting the destination. Visits to the Visitor Information Centre by day and staying visitors remains consistent across the years; circa 10%. The rating of quality of service and usefulness of information is very high; featuring in the top 10 highest satisfaction factors for the Borough.

Consumer use of printed guides continues to decline; as Time Out City guides close (January 2016) is it 'time up' for printed guide books? Yet the promise of the digital destination guides has not really borne out for any destination; Wi-Fi is not universally free and coverage is patchy across the UK.

There may be an opportunity to present a more holistic view of all that RBWM has to offer, with digital technology and newer media (vlogs and blogs) providing the opportunity to supplement printed guides.

### Recommendations

- Review options for income generation in preparation for any loss of advertising in the printed guides
- Focus on most influential Bloggers
- Implement RBWM's social media strategy with a strong input from industry stakeholders in terms of content and imagery
- Investigate potential for partnership funding towards enhanced PR activity including hosting more media visits

### Lead Stakeholder

Visitor Management and Marketing Team

## 6.6 People

This is the objective from the previous strategy:

- To ensure frontline staff act as proud ambassadors, understand the needs of visitors and are knowledgeable about the destination.

The 2012 London Olympic and Paralympic Games provided an intense focus on the 'people factor'. A legacy of the Games provides the Borough with a strong resource of locally trained ambassadors, who continue to provide the welcome and local knowledge expertise visitors want and expect. The feeling of welcome in Windsor is rated by visitors as consistently high.

The tourism and hospitality industry continues to have challenges in recruitment and retention of staff. The World Travel and Tourism Council (2015) identified that Human Capital challenges will be greater to the travel and tourism industry in the next 10 years than any other industry.

There is a risk that the tourism workforce currently drawn from a variety of European countries will leave post Brexit and further exacerbate the industry's talent deficit.

### Recommendations

- Continue to develop the Royal Borough Ambassadors for existing and potential events in the Borough
- Work with HR Managers, local FE colleges and Education Business Partnership to identify skills and labour opportunities
- Use Ambassador resources to generate income for reinvestment e.g. donations from commercial events in return for voluntary services
- Address national living wage
- Promote apprenticeships

### Lead Stakeholder

LiveTourism

## ACTION PLAN

The projects identified in this action plan will be fully scoped by our task groups before resources are identified and deployed.

### Travel & Transport objectives:

- To ensure that visitors to the Borough can get in, out and about with ease
- To provide and influence the use of appropriate alternatives to car travel

No.	Action	Risks	Managing the risk	Timescale	Lead	Stakeholders
1	Revise travel information in all communications and develop a template for stakeholders to ensure consistency of information about travel to the Royal Borough.	Businesses do not adopt new travel info resulting in conflicting messages for travellers.	Promote the benefits of concise and consistent information from all possible sources	Year 1	RBWM, Head of Highways & Transport	Local Tourism Sectors
2	Participate in steering groups and act as key contact for any consultations regarding public transport links between London, LHR and RBWM.	Decisions are made without consideration for travellers needs.	Ensure RBWM understands the significance of the visitor economy and the need to provide easy access.	Year 1, 2 and 3	RBWM, Head of Highways & Transport	RBWM Transport Officers and key Councillors
3	Lobby South West Trains to reinstate the fast service between Waterloo and Windsor & Eton Riverside	SWT does not reinstate service.	Prove the level of demand for the service and support from Windsor businesses.	Year 1 and 2	RBWM, Head of Highways & Transport, WETP	Local Tourism Sectors
4	Influence decision making for coach parking in RBWM.	Coach bourne tourism is not considered in RBWM's parking strategies. Alma Road Coach Park is lost or the facility is moved to a less accessible location.		Year 1, 2 and 3	Visitor Management	Local tourism sectors, RBWM officers and councillors
5	Research destinations that have succeeded in achieving traffic free centres and share learnings.	None	None	Year 2	RBWM, Head of Highways & Transport	Local tourism sector
6	Foster a partnership with TFL in relation to Crossrail to establish travel, stay, experience packages	TFL unwilling to engage or to create packages	Sell the commercial benefits of packaging and how RBWM can help to facilitate relationships with local businesses	Year 2 & 3	Head of Highways & Transport	Local tourism sector

## Product objective:

- To ensure our product meets the needs of loyal visitors as their demands change, as well as meeting the needs of new visitors in emerging markets.

No.	Action	Risks	Managing the risk	Timescale	Lead	Stakeholders
1	Audit the family product in RBWM to identify opportunities, gaps and key marketing messages.	Key product is missed and a full picture of what is available across the borough is not available.	Carry out a thorough borough-wide audit.	Year 1	Legoland Windsor	RBWM, Local tourism sector
2	Develop itineraries and packages specifically tailored to the family market.	Not all businesses will be able to feature in all packages and itineraries.	Use Marketing Task Group to develop them. Ensure that the range of packages and itineraries is comprehensive enough to cover all the needs of the family market.	Year 1 and 2	Legoland Windsor	RBWM, Local tourism sector
3	Develop a selfie trail for families.	Industry partners unwilling to contribute towards costs of development, production and marketing.	Sell the benefits of the trail to businesses. Seek a main sponsor.	Year 1	Marketing Task Group	Local tourism sector. Ice Experience
4	Audit 3, 4 and 5 star product in RBWM suitable for the MICE market to identify opportunities, gaps and key marketing messages.	Key product is missed and a full picture of what is available across the borough is not available.	Carry out a thorough borough-wide audit.	Year 1	RBWM	Local tourism sector
5	Develop itineraries and packages specifically for MICE buyers.	Not all businesses will be able to feature in all packages and itineraries.	Use Marketing Task Group to develop them. Ensure that the range of packages and itineraries is comprehensive enough to cover all the needs of the family market.	Year 1 and 2	Marketing Task Group	Local tourism sector
6.	Encourage leisure businesses to develop products and services suitable for the MICE market.	An unwillingness from leisure businesses to consider their suitability for the MICE market	Sell the benefits of targeting this lucrative market and educate businesses as to what is required to attract the corporate market.	Year 2 and 3	Marketing task group	Local tourism sector

## Marketing objectives:

- To rebrand Windsor to ensure its proximity to London and Heathrow is understood
- To reposition the destination as ‘family-focused’

No.	Action	Risks	Managing the risk	Timescale	Lead	Stakeholders
1	Bid to VisitBritain's Discover England Fund to deliver a rebranding exercise for Windsor as "London's Country Estate".	Bid is unsuccessful	Look for alternative funding options	Year 1	RBWM	Local tourism sector
2	Reposition Windsor as "London's Country Estate" to promote its proximity and easy travel links to London and the airport.	Lack of cooperation from major stakeholders to adopt new positioning and assist in its promotion	Use marketing task group to develop the brand and act as ambassadors to encourage other businesses to participate	Year 1, 2 and 3	Ascot Racecourse/ Crown Estate	Local tourism Sector, Windsor & Eton Town Partnership, Maidenhead Town Partnership
3	Develop marketing messages that promote the royal borough as a family friendly destination.	Local industry does not fully participate and produce the messaging required	Use marketing task group to ensure business involvement	Year 1 and 2	Legoland Windsor	Local tourism Sector, Windsor & Eton Town Partnership, Maidenhead Town Partnership
4	Deliver MICE marketing campaign with industry partners to grow business tourism in the borough.	Not enough industry partners secured to get campaign off the ground.	Sell the benefits of working together to promote the destination for business visits and events.	Year 1 and 2	RBWM	Local MICE sector
5	Exploit VisitEngland's six key areas of focus: product/event development and bid support, international sales and marketing platforms, direct national government support, advocacy for business events, research and insights, understanding and sharing global best practice.	Royal borough's voice not heard amongst much larger destinations. Lack of financial resource to fully participate in sales and marketing activities.	Actively engage with VE, involving them in MICE steering group meetings and assisting them wherever possible with low cost and free activities such as hosted buyer trips.	Year 1 - 3	RBWM	Local MICE sector

## Information objective:

- To provide accessible, accurate and appropriate information that puts the needs of the visitor first and to facilitate information among the local tourism industry.

No.	Action	Risks	Managing the risk	Timescale	Lead	Stakeholders
1	Implement new social media strategy incorporating new "Londons Country Estate", family friendly and MICE messaging	Lack of appropriate content from industry partners.	Sell benefits of the social strategy for businesses and the importance of sharing content with RBWM.	Years 1-3	RBWM	Local tourism sector
2	Continue investment in web development, SEO and other technical advancements	Lack of funding prevents continual investment in digital channels and the royal borough falls behind other destinations.	Submit bid for funding as early as possible in council cycle to secure necessary budgets.	Year 1	RBWM	Local tourism sector
3	Achieve an extended and enhanced PR service through support from industry partners.	Industry partners unwilling to contribute financially to borough-wide PR strategy	Sell the benefits of extending the service as well as raising awareness of the problems associated with not having a comprehensive and proactive strategy for the destination.	Year 1	RBWM/ Marketing task group	Local tourism sector
4	Review opportunities for extending the facilities and services of the VIC.	Lack of resources does not allow the VIC service to be developed beyond its current facility and range of services.	Plan for future development to allow time to source funding and partnerships.	Year 1- 3	RBWM	Local Tourism Sector
5	Tailor information used in all marketing communications for appropriate key audiences e.g., consumer, travel trade and press.	Information is not appropriate for the audience and does not include key messages.	Work with task groups to ensure messages are correct.	Year 1- 3	RBWM	Local tourism sector

**People objective:**

- To ensure frontline staff act as proud ambassadors, understand the needs of visitors and are knowledgeable about the destination.

No.	Action	Risks	Managing the risk	Timescale	Lead	Stakeholders
1	Build on existing hotel HR Forum to expand into other industry sectors.	Resistance by HR managers to participate.	Sell the benefits for their businesses as well as for the destination.	Year 2	RBWM	Local industry HR Managers
2	Act as a signpost to relevant training opportunities.	None		Years 1-3	RBWM	Local industry HR Managers and tourism businesses
3	Continue to develop and grow the Royal Borough Ambassador scheme.	Lack of manpower to continue scheme development.	Enlist help of volunteers who are eager to see the scheme continue and to grow.	Year 1- 3	RBWM	Royal Borough Ambassadors and local industry sectors.
4	Identify opportunities for revenue generating for the Ambassador scheme through activities and events. Devise a policy to encourage donations to reinvest in the scheme and other tourism related projects.	Event organisers are resistant to making donations.	Highlight the labour costs saved by using the Royal Borough Ambassadors and the need to continually develop the scheme.	Year 1-3	RBWM	Local event organisers, Windsor & Eton Town Partnership.

## APPENDIX 1 - SUMMARY SWOT ANALYSIS

### STRENGTHS

- Increase in Nights and trips – Increase in real term spend by overseas visitors
- Shopping spend up
- Increase in FTE jobs
- Destination doing well compared to South East (SE) as a whole
- Average spend per night higher than SE and England
- Destination meeting or exceeding customer expectation consistent across years
- The number of first time visitors up year on year
- Brands and events with global appeal and particular resonance with USA, China & Australia
- Above average range of independent shops
- Appeal to film companies continues to increase
- Good transport connections; London and South East
- Private sector investment continues to grow
- Increase in business visits
- Established team at RBWM

### WEAKNESSES

- Spend increases are below inflation
- Average nights in destination and spend per night/trip down
- Spend on attractions/entertainment down 11%
- Quality of rising FTE jobs unknown
- The Olympic Games marginal influence in spend or visits
- Half of visitors not influenced by any communication channels.
- Low take-up of park and ride; arriving by car increasing
- Availability and cost of parking in Windsor
- There is no future 'big' event in the Borough, unlike many recent years
- The destination is perceived more crowded
- Lack of sharing local data; difficult to respond to changing circumstances
- Limited information available in foreign languages

## OPPORTUNITIES

- Bidding into the £40m Discover England Fund (Opened May 2016 – 3 years)
- Falling value of £ - potentially more overseas visitors
- 9 million 75+ over next three decades – opportunity to cater for inter-generational groups
- Over next decade consumers with confidence will spend at premium end of market
- Rejection of technology – a short term trend will see people ‘logging out’
- Countries visiting Windsor increasing and Chinese visitors featured in top 10 for first time in 2016
- Consumers prioritising leisure spend; despite cutting back in other areas
- Increase in short breaks (at expense of longer ones) and turning VFR into leisure breaks
- Flexibility is key to short breaks – both in how they are booked and how they fit into the consumer’s life
- The global fall in oil prices in 2015/16 could boost disposable income for overseas visitors
- Countries visiting Windsor are in the top 20 markets for projected growth between 2011-20.
- Growing Business Tourism
- Regeneration of Maidenhead
- Crossrail infrastructure; speed to and from London

## THREATS

- Decline in Local Authority funding year on year
- Continued fall in Dollar and US travel
- 28% of adults visiting Windsor are 35-54 age group. In the next decade 35-49 age group will decline in size – squeezing middle generation
- Not responding to key and growing markets e.g. BME, gay parents
- Finances will remain tight for domestic market in this decade
- Last minute bookings set to endure into long term
- Deal-hunting behaviour continues from both domestic and overseas tourists
- Emerging markets experiencing recession
- Uncertainty of economic confidence and volatile exchange rates
- Small share of voice in crowded marketplace
- Increasing competition for and investment in tourism; internationally and domestically
- A European workforce leaving the RBWM post Brexit
- Decline in B&Bs – limited high end?
- Increase in national living wage
- Changes to business rates.

## APPENDIX 2 - REFERENCES

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