LEICESTER TOURISM ACTION PLAN
2015 TO 2020

City Mayor
Tourism is playing an increasingly important role in our city’s economy. It creates almost 7,000 jobs and in 2013 the value of tourism to Leicester was over £512 million up 6.1 per cent from the previous year.

Since the discovery of the body of King Richard III in 2012, we’ve seen a significant rise in interest in Leicester and in the number of visitors coming here. There is still much debate about Richard’s reign and he remains a controversial figure, the last in the Plantagenet dynasty and the last English monarch to die in battle. People have come from all over the world to explore his story in the city and the surrounding area.

This interest in Leicester will grow further with the recent opening of the King Richard III Visitor Centre and after the king is reinterred in Leicester Cathedral in March 2015.

We know that Leicester has the potential to become a primary tourist destination. It’s a city with a fascinating history and its own special character. The modern city is known for its diversity, with different communities coming together to create a unique and vibrant culture.

This plan shows how we intend to realise the vision for tourism in Leicester, supporting the local industry to deliver sustainable growth and establish the city as an attractive destination for leisure and business visitors alike.

Our Connecting Leicester programme is central to this vision. Over the past two years we have undertaken major work in the city centre to link our important heritage sites with the modern retail heart. This includes pedestrianisation, cycle routes, and the creation of more green space. We have also invested to improve accessibility in the city centre, with better signage, interpretation, lighting and transport facilities.

An increase in tourism will bring enormous economic benefits to Leicester, stimulating growth and creating more jobs for local people. Working together we can turn this plan into reality.

Sir Peter Soulsby
City Mayor
As a tourist destination Leicester offers a huge variety of attractions and events. Visitors can explore 2,000 years of history from Roman mosaics at Jewry Wall to the Victorian innovation of Abbey Pumping Station.

The contrast between the historic and the ultra-modern is reflected in our many museums and entertainment venues.

The city has an impressive retail and leisure offer ranging from value to premium brands with over 60 per cent being independent businesses. In just a five minute walk shoppers can move from the 800-year old Leicester Market through The Lanes to the gleaming John Lewis and other top retailers and eateries in Highcross. Independent restaurants and cafes offer a truly international choice of cuisine and thrive in The Lanes, the West End and along the Golden Mile.

The lively music scene in the city offers something for all tastes in a range of different sized venues from The O2 Academy, De Montfort Hall to the smaller, independent music venues. Leicester is a city with a fantastic sporting heritage and we are a host city for the Rugby World Cup 2015.

An annual programme of diverse and exciting festivals and events includes Dave’s Leicester Comedy Festival and the huge Diwali celebrations in Belgrave.

Leicester’s diversity also brings us beautiful places of worship and events that celebrate the many different faiths and cultures that make the city so vibrant.

**Councillor Piara Singh Clair**

*Assistant Mayor for Culture, Leisure and Sport*
The 2013 value of tourism to Leicester and Leicestershire was £1.48 billion. This represents an increase of 6.2 per cent on the previous year and double the regional average growth over the same period.

Over 29 million people visited Leicester and Leicestershire in 2013.

Baseline 2013 STEAM figures¹
Value of tourism for Leicester
£512 million

Projected
£78 million increase by 2020 to
£590 million

Number of overnight stays (including visiting friends and relatives)
4.4 million

Projected
800,000 increase by 2020 to
5.2 million

Number of tourism jobs created and safeguarded
6,913

Projected
Increase of 1,087 jobs by 2020 to
8,000

Number of visitors to Leicester
9.5 million

Projected
Increase of 4.1 million visitors by 2020 to
13.6 million

¹Scarborough Tourism Economic Activity Monitor (STEAM) 2013
This Tourism Action Plan for the city sets out a vision whereby in 2020, Leicester will be firmly established as a primary tourism destination, a first choice for an increasing number of both leisure and business visitors, where tourism plays a central role in delivering sustained and sustainable growth in the city’s economy.

A key focus of this action plan is to build on the once-in-a-lifetime opportunity of the international recognition of the city generated by the discovery of the remains of King Richard III, the opening of a major new visitor attraction to tell the story of King Richard III and his reinterment at Leicester Cathedral in March 2015. These recent events add to the growing reputation of Leicester as a place to visit and do business and provides a fantastic platform to introduce visitors to the whole range of experiences offered by the city. These include heritage, culture, canal and green spaces, sport, shopping, leisure, hospitality and conference and event facilities. Attracting an increasing number of visitors, students, events and companies to this truly cosmopolitan city to stay longer and spend more will help stimulate economic growth and create additional jobs.

Furthermore, this action plan acknowledges that visitors do not recognise boundaries. To maximise the impact of tourism activity, we will deliver a seamless experience to visitors where the city and county offers are intrinsically linked. This approach will also be followed with other places in the UK that have linked attractions with the city and county.

To inform the development of this action plan, an assessment was undertaken of the recent performance of the Leicester tourism industry and the main challenges, changes and issues that the industry is likely to face over the next five to ten years. From this analysis, we have been able to identify the key priorities and needs in order to realise the vision for tourism in Leicester. A programme of action is proposed across four strategic themes, which aim to address the local tourism industry’s needs in a practical way.

Strategic Context

The preparation of this Tourism Action Plan has also been guided by the broader strategic priorities and actions set out within the City Mayor’s Economic Action Plan 2012 to 2020 in particular:

1. To deliver sustained and sustainable growth in the city’s economy
2. To increase the level of inward investment attracted into the city
3. To create a strong identity and image for the city
4. To establish Leicester as an attractive destination
5. To build the confidence of the people in the city.

This Tourism Action Plan is aligned with Leicester’s Place Marketing Action Plan. It also complements the priorities and actions set out in the Leicestershire Tourism Strategy and also the wider ambitions and longer term direction set by the Leicester and Leicestershire Enterprise Partnership (LLEP) in its Strategic Economic Plan (SEP) for the Leicester and Leicestershire Sub-region.

2 www.llep.org.uk/SEP
The importance of tourism

Tourism makes an important and growing contribution to the city of Leicester’s economy. It is a dynamic and broadly-based sector which has proved resilient through the worst years of the recession. In 2013, tourism contributed over £512 million to the city’s economy, generated by day visitors, staying tourists, people visiting friends or relatives and people coming to Leicester for work or business purposes. The tourism sector also supported over 6,900 jobs in 2013, employed in hundreds of city businesses that support tourism, ranging from suppliers to attractions, hotels, restaurants and pubs to retail and cultural, sport and heritage venues.

Tourism is also important for the city in terms of the range of employment, career and business opportunities it creates, whether in customer service, hospitality, food and drink, management, or the artistic and heritage professions.

This includes permanent, temporary and casual employment and self-employment opportunities. The sector is particularly important for providing job opportunities for those trying to find their first steps into employment, including school-leavers, and young people or those unable to work full-time.

Leicester as a tourist destination

To be successful in an increasingly competitive market place, Leicester must offer people a ‘visitor friendly’ destination with good transport links and accessibility, great value for money, a wide range of quality attractions, accommodation and experiences, a warm and genuine welcome and be physically attractive. Developing local distinctiveness will also broaden the offer to tourists and attract a wider audience.

Leicester has a wealth of attractions for visitors to experience and enjoy. They include the National Space Centre, the 2,000 year Story of Leicester, New Walk Museum, a number of beautiful parks and waterways, acclaimed sports teams, a varied retail sector, the 800-year old Leicester Market, the Golden Mile, cuisine from all corners of the world, a vibrant programme of festivals and events, a lively music scene, the award-winning Curve theatre, De Montfort Hall, Attenborough Arts Centre and the Great Central Railway.

Leicester has recently gained worldwide publicity following the discovery of the remains of King Richard III. This discovery has created an unprecedented opportunity to raise the profile of the City both nationally and internationally. The ambitious marketing programme will attract many first-time national and international visitors to Leicester. It has also provided a significant platform to build on the City’s broader key tourism strengths in heritage, culture and diversity and greatly enhances our ability to attract new inward investment.

Four strategic themes

1. PRODUCT
   Expanding the range of high quality and diverse visitor attractions, accommodation, facilities and experiences in the city of Leicester

2. PLACE
   Ensuring the city’s infrastructure, public realm and public transport services are of a quality standard and sufficiently integrated, accessible and efficient to support visitors’ needs

3. POSITIONING
   Positioning Leicester to distinguish it from its competitors

4. PEOPLE
   Investing in skills and training to improve customer service and promoting tourism as a ‘first choice’ career or business opportunity
Top 10 priorities

A number of objectives have been identified for each of the four strategic themes. For each of these objectives, a number of action areas have been proposed. These are detailed in the specific chapters in this action plan dealing with each of the strategic themes. Of these, 10 priority action areas have been identified as the key areas of focus for delivering the action plan in the short to medium term. These are:

1. To maximise the opportunities for overall tourism growth presented through the city’s King Richard III story
2. To work with a wide range of partners to identify and address the gaps, range and quality of the tourism product in Leicester
3. To enhance the role of culture and heritage in tourism
4. To improve the quality and accessibility of the overall visitor destination experience to ensure the city is an easy, safe, secure and welcoming place to visit – day and night
5. To develop a stronger and distinctive identity for Leicester that captures the different character areas and the cosmopolitan vibrancy of the city and builds on its environmental reputation
6. To focus efforts on maximising economic impact by increasing overnight stays and encouraging repeat visits and extended leisure stays through creating new multi-venue experiences to champion the wide range of cultural, heritage and leisure experiences in the city
7. To support attractions and tourism providers in appealing to the day-trip and group travel markets and providing coach drop off, pick up and parking facilities
8. To deliver seamless offers and experiences across the city and county and beyond, where these offers are intrinsically linked and require a joined up approach
9. To grow the business tourism market, through securing conferences, events and product launches by promoting the range of venues and facilities in the city
10. To promote tourism as a ‘first choice’ career for people in Leicester by investing in skills and training.

Growth targets

In order to monitor the overall delivery of the action plan, the following high level targets from the Economic Action Plan 2010 - 2020 have been identified in Table 1. Further targets will be identified in the Tourism Delivery Plan.

Table 1. High level Leicester tourism targets for 2020

<table>
<thead>
<tr>
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<th>£590 million</th>
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<tbody>
<tr>
<td>Value of tourism for Leicester</td>
<td></td>
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<tr>
<td>Number of overnight stays</td>
<td>5.2 million</td>
</tr>
<tr>
<td>(including visiting friends and relatives)</td>
<td></td>
</tr>
<tr>
<td>Number of visitors to Leicester</td>
<td>13.6 million</td>
</tr>
<tr>
<td>Jobs created and safeguarded by the tourism sector</td>
<td>8,000</td>
</tr>
</tbody>
</table>

Delivery

The existing working arrangements within the city of Leicester that oversee the delivery of the city Mayor’s Economic Action Plan (2012 to 2020) will provide the framework within which the Tourism Action Plan will be delivered. This will ensure that the Tourism Action Plan fits with the city’s main economic priorities and influence where public funds should be directed in supporting the local economy.

A Tourism Advisory Panel will be formed in Spring 2015 and key partners in the tourism sector will be invited to join it. A Tourism Delivery Plan will be developed from the action areas within this plan. This will set out in detail the specific programme of actions to be implemented, those involved in the delivery of these actions, resources and timescales.

The city will continue to work in partnership with the county to deliver a seamless experience to visitors to maximise the economic and social impact in the region of tourism activity.
Vision
This Tourism Action Plan sets out a vision whereby in 2020, Leicester will be firmly established as a primary tourism destination, a first choice for an increasing number of both leisure and business visitors, where tourism plays a central role in delivering sustained and sustainable growth in the city’s economy.

Approach
The discovery of the remains of King Richard III in a Leicester car park in September 2012 resulted in an unprecedented opportunity for the city. Over 200,000 local, national and international visitors flocked to the exhibition, Richard III: Leicester’s Search for a King, in The Guildhall and a major new visitor attraction, King Richard III: Dynasty, Death and Discovery opened in July 2014. The reburial of the remains of King Richard III in Leicester Cathedral in March 2015 will complete the amazing story of King Richard III’s connection with Leicester.

The King Richard III story has already impacted on the local economy with the value of tourism rising in 2013 by 6.1 per cent on the previous year against a target of 3 per cent. The King Richard III Visitor Centre has a robust marketing strategy in place to ensure the appeal is sustained through the ongoing development of the experience over the years.

The challenge the city faces in the forthcoming years is how to increase visitor spend by extending the depth of the overall city experience and securing overnight stays. The approach will be to engage an ‘attract and disperse’ strategy which will bring visitors into the city for a specific attraction or interest and then, by providing information on other experiences, persuade them to stay and enjoy themselves for longer. Adopting a multi-channel marketing approach will ensure that information on what to do and see is easily available to all ages and cultures and packaged according to the target audience.

The mediums for achieving this aim will range from personal interface with the knowledgeable advisers in the Visit Leicester Information Centre, printed leaflets and interpretation panels to websites, mobile phone apps and the use of QR codes. Identifying the different target audiences and routes to market will be important to securing visitors from the group travel market, educational institutions, special interest groups and conference and event delegates.

The King Richard III story, sporting successes, the recognition gained through being selected as one of four candidate cities for UK city of culture 2017, the 2,000 year Story of Leicester, the City’s ‘green’ credentials, as well as the growing reputation of the city as a place to do business and host conferences, provides a fantastic platform to introduce visitors to the whole range of experiences offered by Leicester. Attracting an increasing number of visitors, students, events and companies to this truly cosmopolitan city, will help stimulate economic growth and create additional jobs.

Another key aim of this action plan is to create a more coherent and coordinated approach to tourism provision in the city. As an industry, tourism differs from many other parts of the economy in that it has little homogeneity. The businesses that make up the industry vary in size, provide a broad mix of services and facilities, ranging from tourist
attractions to hotels, bed and breakfast and other accommodation providers, through the retail sector to restaurants, cafes, bars, pubs and music venues, transport services and operators of sports facilities, theatres and other cultural venues. The varied make-up of the industry poses a real challenge to the search for a synergy between its different services.

Furthermore, this action plan acknowledges that visitors do not recognise boundaries. We need to deliver seamless offers and experiences to visitors where the city and county offers are intrinsically linked. This approach will be extended to include other cities linked to attractions in the city and county.

In preparing this action plan, an assessment has been undertaken of the recent performance of the Leicester tourism industry and the main challenges, changes and trends that the industry is likely to face over the next five to ten years. From this analysis, it has been possible to identify the key priorities and needs in order to realise the vision for tourism in Leicester. A number of priority action areas are proposed across four strategic themes, which have been identified in order to address the local tourism industry’s needs.

### Value of tourism

Tourism makes an important and growing contribution to the economy in Leicester and Leicestershire. This is both in terms of the amount of visitor spend in the city each year and the number and range of employment, career and business opportunities it offers, including permanent, temporary and casual employment and self-employment opportunities. Tourism is particularly important for providing job opportunities for those trying to find their first steps into employment, including school-leavers, young people or those unable to work full-time.

Appendix 1 provides a detailed assessment of the value of tourism. The latest research\(^3\) into the performance of the tourism industry indicates that in 2013, the value of tourism to Leicester and Leicestershire was £1.481 billion with strong signs for future growth. The economic impact of tourism in Leicester in 2013 was £512 million, up from £483 million in the previous year – a 6.1 per cent increase. For Leicestershire, the economic impact value was £969 million, compared to £913 million in 2011. There were 29.45 million tourists visiting Leicester and Leicestershire in 2013, which equates to 35.47 million tourist days. Tourism supported over 20,400 jobs in Leicester and Leicestershire in 2013.

A key aim of this Tourism Action Plan for Leicester is to support the local tourism industry and lead to more successful and profitable businesses in the city, providing a vital source of new jobs. Growing tourism in Leicester will also create the potential ‘spin off’ of more local sourcing of supplies and services helping other businesses and increasing money circulating in the local economy. In some cases, tourism may help to support and sustain local facilities and services such as local shops and transport, culture, arts, heritage and sports facilities that might not survive if only reliant on local use.

### Strategic context

The preparation of this Tourism Action Plan is to support the local tourism industry and lead to more successful and profitable businesses in the city, providing a vital source of new jobs. Growing tourism in Leicester will also create the potential ‘spin off’ of more local sourcing of supplies and services helping other businesses and increasing money circulating in the local economy. In some cases, tourism may help to support and sustain local facilities and services such as local shops and transport, culture, arts, heritage and sports facilities that might not survive if only reliant on local use.

This complements the priorities set out in the Place Marketing Action Plan for Leicester and Leicestershire Tourism Strategy. It also supports the wider ambitions and longer term direction being set by the Leicester and Leicestershire Enterprise Partnership (LLEP) in its Strategic Economic Plan (SEP) for the Leicester and Leicestershire Sub-region. In the SEP, the LLEP considers tourism as “a major potential growth sector for Leicester in the coming years, particularly with the discovery of the remains of King Richard III.” The LLEP identifies tourism and hospitality as a key growth sector in the sub-region and has prioritised the development of a sector growth plan in its SEP in order to increase the share of employment, drive up earnings and GVA and improve survival and productivity of businesses within the tourism and hospitality sector.

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\(^3\) Scarborough Tourism Economic Activity Monitor (STEAM) 2013
Sustainability

Leicester has a strong international reputation for its work on sustainability and has previously run green initiatives with the hospitality sector. Tourism has an important role to play in achieving a more sustainable environment. There is a growing customer awareness demanding a lower carbon footprint from tourism businesses and wider adoption of sustainability principles. In encouraging greater sustainability across the industry, there are national accreditation schemes promoting the ‘green’ credentials of tourism businesses. These aim to improve energy efficiency, reduce waste and conserve resources such as water. This includes encouraging more attractions, facilities and venues to support local sourcing of supplies and services. There is also an opportunity to maximise the impact of the tourism economy and protect and create jobs for local people by managing, developing and promoting the city’s tourism assets in a sustainable manner. Sustainable transport and promotion of green opportunities through the wider tourist offer will enhance the Leicester tourist experience.

A key priority for Leicester will be to manage, develop and promote the city’s tourism assets in a sustainable way, to maximise the impact of the tourism economy through wealth generation and the protection and creation of jobs for local people. This will be achieved through:

- developing and promoting the green tourism offer as a distinctive feature of Leicester
- welcoming, involving and satisfying increasingly demanding and informed visitors
- achieving a profitable Industry driven by quality
- engaging and benefitting host communities
- protecting and enhancing a distinctive local environment.

Four strategic themes

Based on an assessment of the performance of the tourism industry in Leicester and Leicestershire and the main challenges and future trends facing the industry over the next five to ten years, we have identified four strategic themes that will help realise the vision for Leicester set out in this action plan (see Figure 1). This assessment also identified a cross-cutting activity relating to ‘Intelligence’ and the importance of providing up-to-date intelligence and data to inform better decision making, improve the measurement of tourism and improve the sharing and dissemination of information. Robust arrangements will be put in place for measuring, understanding and reporting the impact of the Tourism Action Plan and the performance of the local visitor economy, and to provide research and market intelligence to underpin interventions.

Figure 1. Leicester’s four strategic themes for tourism
Tourism has an important role to play in achieving a more sustainable environment.
Strengthening the city’s image, identity and sense of place
Key objectives
A number of objectives and key action areas have been identified for each of the four strategic themes. These are detailed in the following chapters and summarised in Figure 2.

**Objective:**
1. To improve the range and quality of the city’s tourism assets
2. To grow the provision of guest accommodation
3. To invest in retail, food and drink
4. To enhance the role of culture and heritage in tourism
5. To promote sport and leisure opportunities
6. To protect and enhance the natural environment

**Theme:** PRODUCT

**Objectives:**
7. To improve transport infrastructure and services
8. To implement ‘Legible Leicester’
9. To deliver ‘Connecting Leicester’
10. To enhance the public realm and city gateways
11. To create a safe, secure and clean environment

**Theme:** PLACE

**Objectives:**
12. To strengthen the city’s image, identity and sense of place
13. To develop a tourism delivery plan
14. To increase overnight stays and encouraging repeat and extended leisure stays
15. To increase day and night time visits
16. To develop the group travel market
17. To grow business tourism

**Theme:** POSITIONING

**Objectives:**
18. To improve training and skills
19. To achieve service excellence
20. To develop vocational training and apprenticeships
21. To create business and employment opportunities
22. To improve the visitor journey

**Theme:** PEOPLE

Figure 2. Leicester’s key tourism objectives
Top 10 priority action areas

For each of these objectives, a number of priority action areas are proposed. These are detailed in the specific chapters dealing with each of the strategic themes. Of these, 10 priority action areas have been identified as the key areas of focus for delivering the action plan in the short to medium term. These are:

1. To maximise the opportunities for overall tourism growth presented through the city’s King Richard III story
2. To work with a wide range of partners to identify and address the gaps, range and quality of the tourism product in Leicester
3. To enhance the role of culture and heritage in tourism
4. To improve the quality and accessibility of the overall visitor destination experience to ensure the city is an easy, safe, secure and welcoming place to visit – day and night
5. To develop a stronger and distinctive identity for Leicester that captures the different character areas and the cosmopolitan vibrancy of the city and builds on its environmental reputation
6. To focus efforts on maximising economic impact by increasing overnight stays and encouraging repeat visits and extended leisure stays through creating new multi-venue experiences to champion the wide range of cultural, heritage and leisure experiences in the city
7. To support attractions and tourism providers in appealing to the day-trip and group travel markets and providing coach drop off, pick up and parking facilities
8. To deliver seamless offers and experiences across the city and county and beyond, where these offers are intrinsically linked and require a joined up approach
9. To grow the business tourism market, through securing conferences, events and product launches by promoting the range of venues and facilities in the city
10. To promote tourism as a ‘first choice’ career for people in Leicester by investing in skills and training.
Delivering the strategy

A Tourism Delivery Plan will drive forward the implementation of this action plan. It will set out in greater detail a specific programme of action and coordinate early action, where investment and effort will be focused. It will become a rolling three year programme with an emphasis on the first year and will identify those involved in the delivery of these actions, the resources required and timescales.

Delivering this action plan will require a coordinated effort and the sustained commitment of many organisations and businesses across the private, public, voluntary and community sectors in Leicester.

A Tourism Advisory Board will be formed in Spring 2015 and key partners involved in the delivery of the city’s tourism will be invited to join this board to develop and oversee the implementation of the delivery plan.

The city will continue to work in partnership with the county to deliver a seamless experience to visitors to maximise the economic and social impact in the region of tourism activity.

The existing working arrangements within the city of Leicester that are overseeing the delivery of the city Mayor’s Economic Action Plan (2012 to 2020) will provide the framework within which the Tourism Action Plan will be delivered. This will ensure that the Tourism Action Plan fits with the city’s main economic priorities and influence where public funds should be directed in supporting the local economy.

Growth targets

In order to monitor the overall delivery of the action plan, the following high level targets from the Economic Action Plan 2010 - 2020 have been identified in Table 1. Further targets will be identified in the Tourism Delivery Plan.

Table 1. High level Leicester tourism targets for 2020

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The combination of attractions will create a major tourism hub to build on the city’s reputation as an important visitor destination.
To be successful in an increasingly competitive market place, a tourism destination must offer people the right product.

A key priority for Leicester is to expand the range of quality and diverse visitor attractions, accommodation, food and drink, entertainment, experiences, events, festivals and facilities. We also aim to deliver a high quality tourism experience for all, including those with access and other needs, and offer great value for money, a warm and genuine welcome and to be physically attractive and safe.

Leicester’s King Richard III story has created huge interest around the world. The national and international recognition and interest that has been generated has provided Leicester with a timely opportunity and a unique platform on which to raise the profile of the city, develop local distinctiveness and establish Leicester as an attractive destination.

The proposal to develop the Great Central Railway Museum at Leicester North through a partnership between the Great Central Railway (GCR), the National Railway Museum and Leicester City Council, will build on the success of GCR and create a railway experience of national standing in Leicester. Projected annual visitor figures for the railway and museum combined are around 230,000. It will complement both the nearby Abbey Pumping Station and the National Space Centre, which is the UK’s largest attraction dedicated to space exploration and space science. This has welcomed over 2.5 million visitors in the last 10 years, including hundreds of thousands of school children. The combination of these attractions will create a major tourism hub to build on the city’s reputation as an important visitor destination.
Tourism assets

Leicester is a modern cosmopolitan city, rich in arts, culture, sports and heritage. It is set in the heart of Leicestershire – one of England’s most attractive counties, where the surrounding villages and countryside are within easy reach of the city. The city’s central location makes it accessible from all parts of the country.

The city offers a wide range of quality tourism experiences, including state-of-the-art, award-winning venues like Curve, Highcross Shopping Centre, De Montfort Hall, the National Space Centre and the Golden Mile. We have a fantastic annual calendar of events and festivals, renowned museums and galleries such as the New Walk Museum and Attenborough Arts Centre, a range of cuisines, areas of natural beauty, sporting fixtures and an ancient heritage. Leicester’s history spans over 2,000 years and is fully traceable by visitors through a variety of locations, buildings and interpretation.

- National Space Centre: the UK’s largest attraction dedicated to space exploration and space science
- King Richard III Visitor Centre: the unique story of King Richard III told in three parts: Dynasty, Death and Discovery
- Great Central Railway: the UK’s only double track, mainline heritage railway. If the £10 million lottery bid is successful, a world class railway museum will be created at the Leicester North end of the GCR, planned to open in 2019
- Story of Leicester promoting 2,000 years of history. Heritage interpretation panels throughout the city centre, city walks and trails
- Jewry Wall Museum: part of the Roman town’s public baths and one of the tallest surviving pieces of Roman masonry in the country
- Culture: arts, museums - including internationally renowned collections and galleries and touring exhibitions - theatres, cinemas and a thriving music scene
- A year round programme of award-winning festivals and events, including Dave’s Leicester Comedy Festival, Diwali and Spark Children’s Arts Festival
- Diverse retail and leisure offer: 800 year old Leicester Market, The Lanes independent shops, arcades and the famous Golden Mile, award-winning Highcross shopping centre, Haymarket shopping centre, high street brands and cuisine reflecting Leicester’s cosmopolitan population
- The rich cultures and traditions of the people of Leicester
- History and beliefs of the many faith groups and places of worship
- Educational institutions – conference venues, events, training
- Sporting success in rugby, football, basketball, hockey and cricket
- Beautiful parks, green spaces and waterways, including Riverside Park which blends heritage, sustainable transport and the natural environment, and its unique location so close to many attractions, such as the National Space Centre, Abbey Park, Belgrave Hall and the city centre.
A key priority for Leicester is to improve the range and quality of the city’s tourism assets. This includes bringing investment to new attractions with wide family appeal and working in partnership with local businesses and communities for example, in the Golden Mile and historic villages to develop and promote visitor experiences. There is a longer term opportunity to open up the city’s waterways and waterfronts to visitors to create new experiences and attract different target audiences. Another key priority is to package and promote linked visitor experiences and market them to a wide target audience, including the group travel market, nationally and internationally. Finally, it will also be important to create awareness of the new tourism offers including the story of King Richard III, city walks and trails, and the Story of Leicester.

Objective 1: To improve the range and quality of the city’s tourism assets

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<thead>
<tr>
<th>Key action areas</th>
<th>Timeline</th>
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<tbody>
<tr>
<td><strong>A</strong> Produce a King Richard III marketing strategy and action plan</td>
<td>✓</td>
</tr>
<tr>
<td><strong>B</strong> Strengthen partnership working between the main attractions and venues in the city to enable the packaging of linked visitor experiences to encourage longer stays and repeat visits by promoting the city’s overall tourism offer</td>
<td>✓ ✓</td>
</tr>
<tr>
<td><strong>C</strong> Extend the services and information provided by Visit Leicester Information Centre and measure customer satisfaction through regular research</td>
<td>✓ ✓</td>
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<tr>
<td><strong>D</strong> Redesign the <a href="http://www.visitleicester.info">www.visitleicester.info</a> website to improve functionality and provide better information and integrated links to partner websites</td>
<td>✓</td>
</tr>
<tr>
<td><strong>E</strong> Review the management of key attractions provided by the city council to maximise income generating opportunities and strengthen their viability</td>
<td>✓ ✓</td>
</tr>
<tr>
<td><strong>F</strong> Work with the Great Central Railway to support future development opportunities, including reinstating the bridge across the main line and the development of the Railway Museum at Leicester North</td>
<td>✓ ✓</td>
</tr>
<tr>
<td><strong>G</strong> Work in partnership with local businesses and communities in the Golden Mile and historic villages to develop and promote visitor experiences</td>
<td>✓ ✓</td>
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Accommodation

A range of guest accommodation is available in Leicester, from family bed and breakfast through to four star international and boutique hotels. In the last few years, the city has experienced a growth in the scale and profile of its accommodation stock. While occupancy levels suggest that there is enough capacity in the current supply, further improvement in the earning potential of the city will require continued growth in accommodation provision. This includes the opportunity to create an urban touring caravan/mobile home site in the city to exploit this rapidly growing sector and create new year-round audiences.

Recent investment has been focused mostly in the budget sector. However, there is a need to focus on the feasibility of attracting investment in more rooms at the premium end of the market. Accordingly, future growth will be focused on attracting established and high profile brand names. This will draw in new audiences both for leisure and business tourism and provide the opportunity for increased growth for existing MICE (meeting, incentives conference and events) providers. To support this, further work will be undertaken to identify suitable development and investment opportunities within Leicester.

Objective 2: To grow the provision of guest accommodation

<table>
<thead>
<tr>
<th>Key action area:</th>
<th>Timeline</th>
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<tbody>
<tr>
<td></td>
<td>2015/17</td>
</tr>
<tr>
<td>A Attract investment from established and high profile brand names to provide more hotel rooms at the premium end of the market</td>
<td>✓</td>
</tr>
<tr>
<td>B Investigate the opportunity to create an urban touring caravan/mobile home site in the city to exploit this rapidly growing sector and create new year-round audiences</td>
<td>✓</td>
</tr>
</tbody>
</table>
Retail, food and drink

Leicester boasts many independent retailers, the UK’s largest permanent undercover outdoor market and specialist stores, as well as all the well-known high street names, providing visitors and residents with a wide range of fantastic shopping experiences. Its vibrant city centre also offers an exciting mix of restaurants, bars, cafes and nightclubs with a wide range of cuisines from the best of British to international themed restaurants and music across all genres. There is an opportunity to attract investment that further encourages the development of the different character areas in the city and enhances the “al fresco culture” in the city centre, including pavement cafes, markets, shopping and entertainment to reflect the city’s diverse communities.

The Leicester Food Plan has 10 ambitions for food and drink including the development of a vibrant local food and drink economy which supports food businesses in the city and encourages healthy products at the heart of a nationally renowned food offer. The local food offer will be promoted by a calendar of food events and businesses supported to attain the highest sustainable food standards.

The significant investment made in Highcross has attracted some of the biggest names in retail all under one roof, including the largest John Lewis department store outside London. It also incorporates a choice of stylish restaurants and cafes and a 12-screen Showcase Cinema de Lux. This presents a major opportunity to attract further desirable retail brands as well as build stronger links to the independent retail sector and strengthen and diversify the early night-time economy. Late night shopping at Highcross has helped to merge retail and the early evening economy and other retailers should be persuaded to extend their opening hours into the early evening. Further work is also needed to encourage more retail and leisure businesses to open on Sundays to encourage families to spend more leisure time in the city centre.

There is an on-going programme of investment in retail, food and drink sectors in the city centre, including:

- £9.2 million transformation of the historic Leicester Market
- re-opening of Silver Arcade following £3 million investment
- Hammerson’s investment in St Peter’s Square to deliver, popular restaurants such as Red Hot World Buffet, Frankie & Bennys, Turtle Bay, Coast to Coast, Chimichanga and Bill’s
- top brands like Pret A Manger and Urban Outfitters choosing to open in Leicester
- refurbishment of high street retailer stores Primark and M&S
- improvement plans for Haymarket Shopping Centre by owners Kennedy & Wilson
- the iconic Mercure Leicester, The Grand Hotel is undergoing a £1 million refurbishment of its ground floor introducing a Marco Pierre White, New York Italian restaurant, bar, new reception and fitness room
- growth in the number of specialist bars such as 33 Cank St, Turkey Café, Taps and Gate 38.

Objective 3: To invest in retail, food and drink

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<tr>
<th>Key action areas:</th>
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<tbody>
<tr>
<td></td>
<td>2015/17</td>
</tr>
<tr>
<td>A Work with the Retail Forum to explore extending shopping hours to provide a seamless link between day and early evening economies and increase the number of businesses open on Sundays</td>
<td>✓</td>
</tr>
<tr>
<td>B Work with the Leisure Forum to prepare and deliver an action plan to create a strong and vibrant night-time economy in the city centre</td>
<td>✓</td>
</tr>
<tr>
<td>C Promote the city’s strong, varied retail mix including Leicester Market and the Golden Mile</td>
<td>✓</td>
</tr>
</tbody>
</table>
Culture and heritage

Leicester has a rich cultural and heritage offering that will play an important role in growing the visitor economy. The City’s Cultural Ambition Statement sets out the ambition for Leicester’s culture as a force for economic regeneration, social cohesion, well-being and civic identity. The city Mayor has established a Cultural Advisory Board together with planned investment to improve the cultural offer of the city.

The city’s cultural offering includes but is not limited to:

- King Richard III Visitor Centre, Cathedral, medieval Leicester and links to Bosworth
- Curve: an award-winning world class venue and one of the country’s finest producing theatres
- De Montfort Hall: serving the City with quality live acts for over 100 years
- Phoenix: cinema, art and café bar
- O2 Academy at the University of Leicester—a 1,450 capacity music and club venue
- Attenborough Arts Centre—An award winning multi-use arts centre at University of Leicester offering a wide range of performances, events and workshops
- A rich cultural programme of festivals and events reflecting the city’s diversity, including the largest Diwali celebrations in the western world and the Caribbean Carnival, to Britain’s longest running comedy festival—credited as one of the top five comedy festivals in the world and a new summer City Festival
- A proven ability to deliver very large scale public events, such as Kasabian’s homecoming gig and the Olympic Torch relay
- A wide range of music venues both in terms of music genre and size
- Heritage Open Days providing free access to Leicester’s outstanding architectural buildings of historic importance
- New Walk Museum, one of the premier museums in the East Midlands
- Thriving visual arts scene, including Leicester Print Workshop
- Heritage interpretation throughout the City Centre and walks and trails
- Jewry Wall part of the Roman town’s public baths and at over 9 metres high, one of the tallest surviving pieces of Roman masonry in the country
- The Golden Mile: shopping and dining with the largest concentration of Indian jewellery shops outside of India
- The canal and waterways through the city.

Leicester’s history spans over 2,000 years and is told through the Story of Leicester. The locations, buildings and interpretation form a major part of the city’s character and attractiveness. There is an opportunity to improve and increase the promotion of the range of heritage buildings and sites open to visitors to enjoy. Leicester’s success as a short-listed candidate city for the 2017 city of Culture shone a spotlight on the strong cultural asset base and ambition, which the city will continue to develop.

There is a need to champion culture, heritage and new experiences to draw people to the city. A key priority will be to improve the promotion and awareness of the city’s cultural and heritage offer. There is the potential for this to make an even more valuable contribution to tourism and the local economy by encouraging visitors to stay overnight to enable further exploration of the city’s great offer. Furthermore, although Leicester is great at putting on a show, greater emphasis needs to be given to increasing the ability of festivals and events to attract more visitors to the city from further afield. Wider promotion of the annual calendar of events, securing large sporting events like Rugby World Cup 2015 and the introduction of the new City Festival will attract new visitors from the region and beyond. Research studies of Dave’s Leicester Comedy Festival show that this event is very successful in attracting visitors from further afield and is an excellent example of good practice.
**Objective 4:** To enhance the role of culture and heritage in tourism

<table>
<thead>
<tr>
<th>Key action areas:</th>
<th>Timeline</th>
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</thead>
<tbody>
<tr>
<td>A Champion culture and heritage by increasing awareness of the venues and experiences and promoting multi-experience packages with other partners</td>
<td>✓  ✓</td>
</tr>
<tr>
<td>B Work with Curve, De Montfort Hall and Phoenix to strengthen their role in helping to grow tourism and overnight stays by packaging experiences with other businesses</td>
<td>✓  ✓</td>
</tr>
<tr>
<td>C Develop new walking trails and self-guided walks to showcase the 2,000 year Story of Leicester and link the heritage panels across the city</td>
<td>✓</td>
</tr>
<tr>
<td>D Promote the extensive calendar of festivals and events to attract more visitors</td>
<td>✓  ✓</td>
</tr>
<tr>
<td>E Install poster pillars in the city centre on a trial basis to measure the impact on increasing attendance at events and gigs in the evening</td>
<td>✓</td>
</tr>
<tr>
<td>F Explore the opportunities presented by Faith Tourism as part of Leicester’s cultural and festivals offer</td>
<td>✓</td>
</tr>
</tbody>
</table>
Sport and leisure

There is an increasingly strong sporting scene in Leicester for both spectators and participants, in rugby, football, basketball, hockey and cricket. The continued high profile success of Leicester Tigers, Leicester City Football Club, the European Trophy won in 2014 by the Leicester Hockey Club and the hosting of games in the Rugby World Cup 2015 will all raise the profile of the city and boost the local economy.

The existing and planned additional club facilities will provide an increase in much-needed flexible venues that can be used to host conferences, events, award ceremonies and product launches, all of which will increase business tourism opportunities.

A bounty of green open spaces, cycle paths, parks and recreation areas makes Leicester a great place for outdoor leisure pursuits. An increasingly accessible and attractive waterside (narrow boats, rowing, and so on) also provides opportunities to attract further private investment. It will be important to create awareness and actively promote the existing and developing cycling routes in Leicester to residents, visitors and business people.

Objective 5: To promote sport and leisure opportunities

<table>
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<tr>
<th>Key action area</th>
<th>Timeline</th>
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<tbody>
<tr>
<td>A Further develop the canal, waterways and waterfronts as a tourist and visitor attraction</td>
<td>2015/17</td>
</tr>
<tr>
<td>B Create bespoke packages and incentives to maximise the Rugby World Cup 2015 visitor experience in Leicester city centre, working with local businesses and Visit England</td>
<td>2018/20</td>
</tr>
</tbody>
</table>

Natural environment

Leicester is a great place to live, work and visit, but it can be made even better. The city has some beautiful parks, play areas, green spaces, wildlife areas, lakes and waterways popular with walkers, cyclists, bird watchers and those who just enjoy the open air. More needs to be done to encourage visitors to enjoy the parks, green spaces and wildlife areas and understand the related history.

Abbey Park is Leicester’s premier park, just ten minutes’ walk north of the city centre. The River Soar divides the park into two distinct areas: to the east lies the formally-planted Victorian part of the park, to the west are the remains of the 12th century Leicester Abbey.

The city council is exploring the opportunities to improve links between the city centre and green spaces, including Watermead Park and Aylestone Meadows, rivers and the canal side area. There is huge potential by making the ring road easier to cross and reconnecting the city centre with its 18 kilometres of waterfront. The integration of green spaces and environmental buildings and projects within the Tourism Action Plan will increase the sustainability of the strategy.

The protection and enhancement of green spaces are just as important to our quality of life. The city council has published a 10 year plan to promote biodiversity and aims to increase the number of our parks that hold prestigious Green Flag awards.

Objective 6: To protect and enhance the natural environment

<table>
<thead>
<tr>
<th>Key action area</th>
<th>Timeline</th>
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<tbody>
<tr>
<td>A Improve the connection between Abbey Park and the city centre to improve accessibility</td>
<td>2015/17</td>
</tr>
</tbody>
</table>
The protection and enhancement of green spaces are just as important to our quality of life.
The tourism offer in Leicester is enhanced significantly by the city’s location and accessibility.
THEME 2: PLACE

To be a successful tourist destination, Leicester must also ensure the city’s infrastructure is of a high standard and sufficiently integrated, making it an attractive and easy place to visit.
Transport

To compete effectively in global markets, Leicester has to be easily accessible by air, rail and road. Transport infrastructure has to be of a high standard and sufficiently integrated and efficient to support future visitors’ needs and link people locally with employment opportunities. More needs to be done to exploit the full potential of Leicester’s central location, good public transport, and road and air links for visitors from the UK and overseas through improved promotion. The city council will continue to work with East Midlands Trains and East Midlands Airport to identify initiatives to further improve the visitor journey into Leicester.

Overall access to and within Leicester is generally good, but further improvements are necessary. Investment will be sought for improvements in inter-city rail infrastructure, cross county links and other public transport services. These improvements are needed to create a truly integrated transport network, which is increasingly expected by travellers.

Locally there is a growing network of cycle, walking and riding routes. It will be important to continue to improve and promote walking and cycling routes in the city to support a healthier lifestyle. Further investment will be encouraged to allow tourists to access more of the tourism, heritage and cultural product within the city in a sustainable way. We will investigate new public transport services using heritage railways and the waterways network, which will further support the tourist economy. Sustainable transport options will offer a way of promoting a ‘green’ tourist option for visitors.

Vehicle access into the city centre will be more effectively managed through improved zoning and use of the dynamic signage system for parking. Journey information will be readily available via the internet and apps, and a new bespoke signage, wayfinding and mapping system will provide easy access to and around the city centre.

Objective 7: To improve transport infrastructure and services

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<tbody>
<tr>
<td></td>
<td>2015/17</td>
</tr>
<tr>
<td>A Produce an inclusive design standards guide to ensure access for all in new developments and the public realm</td>
<td>✓</td>
</tr>
<tr>
<td>B Work with public transport service providers to encourage them to extend their services into the evening, weekend and bank holidays; introduce more through ticketing and improve travel information for visitors</td>
<td>✓</td>
</tr>
<tr>
<td>C Review coach pick up points, parking and toilet facilities in the city centre to attract the new group travel market</td>
<td>✓</td>
</tr>
<tr>
<td>D Develop a parking strategy that supports the needs of visitors, as well as residents and businesses, by improving the quality of car parks and introducing a consistent and simple approach to parking charges</td>
<td>✓</td>
</tr>
<tr>
<td>E Exploit the full potential of Leicester’s central location, good public transport and road and air links for visitors from the UK and overseas through improved partnership working and promotion</td>
<td>✓</td>
</tr>
</tbody>
</table>
**Legible Leicester**
A new bespoke signage, wayfinding and mapping system will be introduced over the next few years. This system will enable visitors to find their way into and around the city more easily and encourage them to explore the different character areas and attractive public spaces. An Architectural Feature Lighting Strategy will showcase buildings of historic and architectural merit and also complement a Wayfinding Strategy. Lighting in the city centre at night will create a better ambience and make it feel more safe and secure.

**Objective 8: To implement Legible Leicester**

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<thead>
<tr>
<th>Key action areas:</th>
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<tbody>
<tr>
<td><strong>A</strong> Redesign the signage across the city including boundary signage, signposting to the city centre and car parks, improve wayfinding for pedestrians and introduce a new mapping system</td>
<td>✓ 2015/17 ✓ 2018/20</td>
</tr>
<tr>
<td><strong>B</strong> Install heritage panels across the city providing information on buildings, monuments and places of historic importance</td>
<td>✓ 2015/17</td>
</tr>
<tr>
<td><strong>C</strong> Further develop the city guides system to improve information for visitors on the city centre’s cultural, artistic and historic themes</td>
<td>✓ 2015/17 ✓ 2018/20</td>
</tr>
<tr>
<td><strong>D</strong> Develop an Architectural Feature Lighting Strategy for the city centre in partnership with building owners and occupiers</td>
<td>✓ 2015/17 ✓ 2018/20</td>
</tr>
</tbody>
</table>

**Connecting Leicester**
Leicester has a vibrant city centre surrounded by many special buildings and places, but over the years it has become more and more challenging for pedestrians and cyclists to get around. In response, the city Mayor launched Connecting Leicester, a major investment programme that is providing high quality and safer pedestrian routes to improve the connections between shopping, leisure, attractions, heritage, housing and transport facilities in the city centre. There is also a need to explore opportunities to increase tourism numbers through improving the links from the canal and waterways to the city’s attractions. Connecting Leicester is making it easier for pedestrians and cyclists to travel around the city centre and explore the superb range of visitor attractions, buildings, venues, beautiful open spaces and experiences that is second to none. It is linking these areas together to create a safe and family friendly city centre, helping existing and new businesses to flourish and attracting more visitors. Connecting Leicester also provides a great opportunity to link what is already good about the city centre with new development opportunities.

**Objective 9: To deliver Connecting Leicester**

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<thead>
<tr>
<th>Key action areas:</th>
<th>Timeline</th>
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<tbody>
<tr>
<td><strong>A</strong> Continue investment in the Connecting Leicester programme to further improve pedestrian and cycle routes, city gateways, green spaces and new buildings</td>
<td>✓ 2015/17 ✓ 2018/20</td>
</tr>
</tbody>
</table>
Public space and gateways

A key priority is to sustain investment in the city’s award-winning public space improvements. This will include further pedestrianisation, continued refurbishment of historic buildings, redevelopment of vacant sites and improved street cleanliness. All of this is critical to the success in developing local distinctiveness, broadening the offer to tourists and attracting a wider audience. The city council is undertaking a continuous programme of environmental improvements to streets and spaces, using high quality materials. Action is already underway to open up the city centre’s streets to pedestrians through changing bus routes, removing roads through shopping areas, changes to lighting, tree planting, seating and other street furniture.

New public space improvements will reflect the city’s heritage. Particular emphasis will be placed on further improvement of the important gateway routes into the city centre and visitors’ first impressions. We will work with businesses to implement the shop improvement scheme to create improved local environs and commercial opportunities that impact positively on public perception. A £6 million improvement programme has been completed for the railway station, Belgrave Road, Granby Street, Humberstone Gate West, Belgrave Gate and Narborough Road gateways, but this is just the start of the process. Continued improvements will be made in these areas and work will take place on other key gateway locations.

An ambitious plan for the redevelopment of a 60-hectare area of the Waterside around the River Soar and Frog Island is proposed, at a cost of £26.5 million. This includes proposals for a new residential community, with a mix of housing and business development including the refurbishment of Friars Mill heritage building. The plans also involve improvements to public spaces, improved connections for pedestrians and cyclists to nearby parks and plans to develop Soar Island as a city centre destination.

Objective 10: To enhance the public realm and gateways

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<tr>
<th>Key action areas:</th>
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</thead>
<tbody>
<tr>
<td>A     Continue to enhance key gateways into the city, creating improved local environments and commercial opportunities and improving public perception</td>
<td>✓</td>
</tr>
</tbody>
</table>
Safe, secure and clean environment

Safety is an important part of the visitor journey. Perceived or real threats to visitor safety have immediate impacts on a destination’s reputation and on the profitability and sustainability of an individual business, community or destination. If a visitor does not feel safe and secure and the environment is not clean and attractive, this may impact on the length of stay and expenditure and decrease the likelihood of repeat visitation and word-of-mouth referrals.

Safer Leicester Partnership brings together a number of agencies and organisations and is responsible for reducing crime, disorder and substance misuse. It is Leicester’s statutory community safety partnership. The partnership includes Leicester City Council, Leicestershire Police, Leicestershire Fire & Rescue Service, Leicestershire & Rutland Probation Trust, Leicester City Clinical Commissioning Group, Chamber of Commerce and the voluntary sector. Its vision is:

“To ensure that all citizens of Leicester and visitors to the city feel safe within their communities and benefit from an improved quality of life and well-being as a result of partnership action to reduce crime and substance misuse.”

It will be important to continue to improve the visitor experience and support the day and night-time economies by reducing litter and anti-social behaviour so that people feel safe and have a feeling of well-being when exploring Leicester in the day time and after dark. The city wardens service aims to improve the quality of the local environment through enforcing the controls to reduce litter, graffiti, fly-posting, and commercial bins.

The creation of beautiful green public spaces, the redesign of existing green space and floral displays add to the attractiveness and appeal of the city for both residents and visitors.

Objective 11: To create a safe, secure and clean environment

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<th>Key action areas:</th>
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<tbody>
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<td>2015/17</td>
</tr>
<tr>
<td>A Work with the police to review Safer Routes and introduce taxi marshalling to</td>
<td>✓</td>
</tr>
<tr>
<td>continue to improve the night-time economy experience</td>
<td></td>
</tr>
<tr>
<td>B Apply for Purple Flag accreditation awarded to places that operate a safe</td>
<td>✓</td>
</tr>
<tr>
<td>and secure night time economy</td>
<td></td>
</tr>
<tr>
<td>C Conduct a baseline public perception safety survey to measure against</td>
<td>✓</td>
</tr>
<tr>
<td>in the future</td>
<td></td>
</tr>
<tr>
<td>D Put in place a performance framework to monitor the improvements in littering</td>
<td>✓</td>
</tr>
<tr>
<td>and anti-social behaviour</td>
<td></td>
</tr>
</tbody>
</table>
Leicester has significant potential to raise its profile on the national and international stage to the benefit of residents, businesses and visitors.
To be successful in a competitive marketplace, Leicester must have a strong image and identity, as well as a clear understanding of its target audiences and the routes to market. It also needs to offer a distinctive and quality product and be perceived as a place that is attractive for visitors, investors and businesses.

The city’s identity needs to be strengthened to address the current large degree of confusion within the tourism industry over its image and appeal to visitors. Effective positioning can help define a tourism destination, its assets and services, as well as its image. It can also help change people’s perception of a destination.

Leicester has significant potential to raise its profile on the national and international stage to the benefit of residents, businesses and visitors. For Leicester to be successful, it needs to differentiate itself from other destinations. Some of its distinctive features are:

- It is a cosmopolitan city with a diverse and relatively young population with 55 per cent of people under 34. Leicester is an international city with strong links overseas, particularly to India
- A rich mix of cultural, heritage, shopping, sport, leisure, parks, waterways and transport hubs within a compact, easily accessible city centre - most other cities we would be compared with are sprawled out over a wider area
- Good connectivity with London and the rest of the UK by road and rail. It is located close to the M1 and M69 connecting it with Coventry and Birmingham. The city also sits at the centre of Leicestershire, one of England’s most attractive counties. The city has a direct rail link from Leicester to London St Pancras International and Europe via Eurostar together with international links through East Midlands Airport
- The county also has a rich offer which complements the city’s attractions – Bosworth Battlefield, Twycross Zoo, Conkers, Bradgate Park, Charnwood Forest and Great Central Railway
- A bespoke support service to potential investors is provided through the council’s inward investment service
- Two high quality universities in the city centre with over 40,000 students and further education colleges making Leicester one of the top students centres in the UK.

A new Place Marketing Action Plan for Leicester will provide the framework to correctly position Leicester within the tourism market, as well as secure international and national inward investment and enable tourism marketing activity to be integrated and aligned within a wider strategic agenda.
Image, identity and place

Leicester is a truly international city of culture, well known for its cultural diversity. It is famous for its vibrant festivals and events as well as the tolerance and harmony that exist between its communities. The city offers a good quality of life, a rich heritage, an exceptional under-promoted green waterside attraction, excellent retail and leisure facilities as well as access to top class sport and entertainment. Significant investment has been attracted into Leicester in the last five years, which has transformed the city centre in particular.

However, in a number of ways Leicester has so far not always fully capitalised on these strengths and opportunities; and for far too long it has been undersold to visitors and investors. There is confusion in the marketplace over what the city stands for and where it wants to be in the future. The marketing of Leicester has been fragmented and this, coupled with an indistinct identity, has compromised the city’s ability to maximise its potential to attract new tourism investment and establish itself as a primary tourist destination. The city has been given a fantastic opportunity with the discovery of the mortal remains of King Richard III to develop a strong brand identity.

Objective 12: To strengthen the city’s image, identity and sense of place

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<tbody>
<tr>
<td></td>
<td>2015/17</td>
</tr>
<tr>
<td><strong>A</strong> Position Leicester as leading city for tourism with national government and agencies to secure funding, enhance its reputation, attract investment and media coverage, and influence policy</td>
<td>✓</td>
</tr>
<tr>
<td><strong>B</strong> Develop a Place Marketing Action Plan to raise awareness of Leicester for tourism and inward investment and to engender a greater sense of civic pride</td>
<td>✓</td>
</tr>
<tr>
<td><strong>C</strong> Produce a city and county guide and map supported by advertising paid for by the private sector</td>
<td>✓</td>
</tr>
<tr>
<td><strong>D</strong> Continue to develop the 2,000 year Story of Leicester to attract visitors and residents to explore the city’s history and culture</td>
<td>✓</td>
</tr>
<tr>
<td><strong>E</strong> Extensive engagement with city partners to maximise effective delivery and consistent messaging and to encourage private sector funding support</td>
<td>✓</td>
</tr>
</tbody>
</table>
Tourism Delivery Plan

A key priority is the preparation of a Tourism Delivery Plan. This will be based on market insights on the value, volume, potential and requirements of each target market, the routes to market and emerging and future markets, as well as technology trends and an understanding of campaign effectiveness.

It is proposed that Leicester adopts a classic ‘attract and disperse’ approach, which uses the city’s strongest and most powerful ‘hooks’ – King Richard III, 2,000 year Story of Leicester, Curve, De Montfort Hall, New Walk Museum, Attenborough Arts Centre, the National Space Centre, sport and a diverse retail offer - to raise interest, grab attention and ‘attract’ people into Leicester.

A range of products, offers and communication activities will be developed to widen visitor awareness of everything else the city has to offer and thus ‘disperse’ them to other experiences, in order to increase dwell time and spend in the city.

In practice, the ‘attract and disperse’ approach will include:

- Introducing family groups to relevant attractions such as the National Space Centre, New Walk Museum, Curve, De Montfort Hall
- Exposing people with a particular interest in heritage to the much wider ‘2,000 years of history’ story
- Underpinning all messages with shopping, eating out, culture, the arts, and the city’s environmental heritage
- Encouraging repeat visits by linking known interests with new experiences, for example - ‘If you liked King Richard III, then you will like New Walk Museum.’

This approach will be driven by an over-arching thematic campaign ‘Discovery’ (King Richard III and Space) two sectorial campaigns (leisure and business tourism,) plus support strands of product development, online, press and PR, and intelligence gathering and use. It will be important to ensure the tourism marketing activity is integrated and aligned with the wider strategic agenda for the city.

Objective 13: To develop a Tourism Delivery Plan

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<th>Key action areas:</th>
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<td></td>
<td>2015/17</td>
</tr>
<tr>
<td>A Establish a City Mayor’s Tourism Advisory Panel to identify the city’s full range of tourism products and coordinate the city’s annual tourism programme of events and activities</td>
<td>✓</td>
</tr>
<tr>
<td>B Prepare a Tourism Delivery Plan working with partners in the tourism sector</td>
<td>✓</td>
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</tbody>
</table>
**Target markets**

Leicester is seen as a year-round destination with little seasonal variation, other than typical dips in August and December. Whilst it is estimated that up to 60 per cent of the visitor economy is based around business tourism, leisure tourism is showing significant growth. Differentiating between the leisure and business markets in Leicester is a key priority.

To date, the driving force for tourism in Leicester has been conferences and events for the business market. Weekday accommodation occupancy has been much higher than at weekends. Recent efforts to grow leisure tourism through short break packages and media marketing has started to broaden the tourism economy. This has been supported by investment in the city centre and in tourist attractions across the city. An encouraging amount of additional capital investment is either underway or planned.

**Leisure tourism**

Leisure tourism includes visitors staying overnight and those spending the day. An important current target market for the city, with regard to leisure tourism is the family market. This has been one of the main target markets for Leicester for many years and will continue to be so in the future. A priority will be to increase the number of short breaks by families using local hotels and building on the city’s ‘green’ credentials. However, an immediate priority will be to widen the market coverage so that more venues benefit through the packaging of experiences and accommodation. Cross promotional opportunities that package different experiences within the city and county will help encourage visitors to stay for longer, spend more and make repeat visits.

Another key priority will be to widen the impact of tourism on the city and to attract other market segments. This will require the development of new products to attract these additional markets. It is proposed that the new priority markets identified include the ‘older active’ and ‘high street’ groups. The key sectors to attract these market segments are food and drink, heritage, waterways, outdoors, shopping, culture and the arts, which will appeal both to the individual traveller and the group travel market.

By using the Arkenford and Cameo profiling tools, a number of key market segments have been identified to target with the leisure offers. Product testing has identified a number of market segments that have proved to be most receptive to the city offer. We will continue to refine these and to develop short break offers to ensure that future marketing campaigns result in the most successful return on investment.

The key target segments for Leicester are:

- **High street:** This market segment is looking for a ‘safer’ and ‘reliable’ experience that delivers value for money. This segment is a considerable size, regarded as recession proof as people in this group have a mid market income and are less likely to be affected by a fluctuating economy receptive to well established brands and look for value for money as well as an enjoyable experience.

- **Empty nesters:** This market segment has a higher disposable income, but is looking for a good ‘value’ break. They are time rich, have a preference for visiting out of traditional seasons and are happy to explore a destination further at their leisure.

- **3C:** Members of this market segment are dual income, own their own home, have school age children, look for quality, value and a worthwhile ‘educationally beneficial’ experience that the whole family can enjoy, influenced by recommendations by like-minded friends and social commentators.

- **International:** Leicester’s primary international target markets are North America and Canada and the close European market, particularly Germany, which is Britain’s second most important market for volume of visits and third for the amount spent by visitors.
Leisure tourism: overnight stays

Tourists that stay overnight are either in paid accommodation or staying with family and friends. They spend more than day visitors and are therefore a primary target audience. 22 per cent of people taking a short break in England stay with family and friends.

The increase in the popularity of ‘stay-cations’ has encouraged the development of short break holidays.

The discovery of the remains of King Richard III and the opening of the King Richard III Visitor Centre and reinterment of the king’s remains in Leicester Cathedral also provides an excellent springboard to increase the number of overnight stays in the city. The city council is working closely with Leicestershire county council to promote the wider opportunities relating to King Richard III, including Bosworth Battlefield. Partnerships with other related destinations in the UK have been forged to offer the national and international traveller the opportunity to book a special interest break.

For example, a six-day holiday package for King Richard III enthusiasts visiting Leicester, Bosworth, Warwick, Stratford on Avon and York.

A further priority will be to encourage visitors to stay more than one night in Leicester. This will require careful and shrewd packaging of other attractions to create appealing and cost efficient short break holidays. Equally, it will be important to build on Leicester’s strong cultural and historical heritage and its links with communities in other countries.

Objective 14: To increase overnight stays and encouraging repeat and extended leisure stays

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<th>Key action areas:</th>
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Leisure tourism: day and night-time visitors

The day and night-time visitor market represents another key market for Leicester. This includes residents, office staff, shoppers, diners, clubbers, and people visiting local businesses, heritage and cultural venues, places of entertainment and sporting venues. To date, there has not been a strategic approach to address these target audiences and a key priority will be to address this matter. There is an opportunity to strengthen the early night-time economy through the success of extended late night shopping.

At present there is limited information promoting the many things to do and see in the city to this captive market. Evidence from initiatives that have been targeted at this market (for example, Big Eat) has shown the potential to encourage more frequent visits to the city. The realisation of ‘Connecting Leicester’ and ‘Legible Leicester’ projects will make it easier for visitors and residents to explore the city and the improved connectivity will provide an ideal opportunity to promote the combining of experiences.

Objective 15: To increase day and night-time visits

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<th>Key action areas:</th>
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<td>2015/17</td>
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<tr>
<td><strong>A</strong> Compile and promote a comprehensive dynamic What’s on and Where to Go listing with city partners to promote Leicester’s overall offer</td>
<td>✓</td>
</tr>
<tr>
<td><strong>B</strong> Produce an annual guide to promote shopping, leisure, heritage and culture</td>
<td>✓ ✓</td>
</tr>
<tr>
<td><strong>C</strong> Conduct perception research locally, regionally and nationally to identify the reasons why people visit and do not visit Leicester</td>
<td>✓ ✓</td>
</tr>
<tr>
<td><strong>D</strong> Work with public transport service providers to encourage them to extend their services into the evening, weekend and bank holidays</td>
<td>✓ ✓</td>
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</tbody>
</table>
A comprehensive dynamic What’s on and Where to Go listing with city partners will promote the city’s overall offer.
Group travel
There is great potential for Leicester to develop the group travel market. In 2011, there were 1.3 billion day trips to English destinations, generating a spend of £42.7 billion. However, the group travel market has yet to be fully exploited in Leicester. A key factor in the past has been the lack of facilities in Leicester to support the group travel market. However, recent actions have sought to address this situation. Coach drop-off and pick-up points have recently been put in place at Southgates and coach parking facilities are available at the National Space Centre and First Bus Depot. Driver facilities are provided and the city centre is only a five minute bus ride away. City centre businesses will be providing additional facilities to coach drivers who will be encouraged to experience the city’s venues and attractions.

There is substantial potential to grow this market in Leicester, particularly with the opportunity to develop themed coach tour packages linked to King Richard III and the Story of Leicester, faith tourism, retail experience focussed on Leicester Market, culture, festivals and events, and parks. This market could provide substantial benefits for retailers, Leicester Market, Golden Mile, entertainment and leisure venues and culture and heritage offers.

A key priority will be to work with partners across the city to improve the way coach groups are received, welcomed, managed and looked after and to put in place a coach drive loyalty scheme.

Objective 16: To develop the group travel market

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<tr>
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<td>2015/17</td>
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<tr>
<td>A Develop themed coach tours based, for example, on history, food, discovery, culture, parks and faiths, to be booked through Visit Leicester Information Centre</td>
<td>✓</td>
</tr>
<tr>
<td>B Put in place a delivery plan to attract the group travel market to include familiarisation trips, attendance at conferences, mailshots, loyalty schemes, collateral and so on</td>
<td>✓</td>
</tr>
<tr>
<td>C Work with partners across the city to improve how coach groups are received, welcomed, managed and looked after</td>
<td>✓</td>
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</table>
Business tourism

Globally business tourism is experiencing unprecedented growth in the supply of facilities. The events industry in Britain is worth almost £25 billion to the economy and employs over 530,000 people. 15.5 per cent of domestic overnight trips in England are for business tourism accounting for 20% of spend. However, at the same time competition has grown considerably.

Within an intensely competitive and crowded marketplace, Leicester has modest but rapidly improving facilities in this sector. For example, the recent expansion of the Leicester Tigers stadium has created the largest banqueting suite in the East Midlands with seating for 1,000 people. The city’s two universities continue to invest in their own excellent conference venues and facilities. Furthermore, establishing the St George’s Cultural Quarter as a conference hub and the successful bid to host the FSB conference in March 2013 have also been positive steps forward. There is an opportunity to market the Old Town venues, attractions and hotel as a potential conference hub.

Business tourism is seen as a priority area of future activity for Leicester. However, the city has limited marketing resources. Creative and innovative solutions will be needed in order for the city’s share of this essential market to grow. In order to develop this market, priority will be given to identify and target events, product launches and conferences that have a strategic fit and match the strengths of Leicester. It will be important to strengthen links with the city’s two universities through the ‘event bidding’ process. It will also be essential to identify local champions and work in partnership to progress event bids. Of equal importance to winning significant events will be effective event management to ensure that hosted events are delivered to the highest standards. Full and proper planning and resourcing will be needed to ensure the full economic potential of all events staged and hosted is achieved.

Objective 17: To grow business tourism

<table>
<thead>
<tr>
<th>Key action areas:</th>
<th>Timeline</th>
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<tbody>
<tr>
<td>A Develop a robust event bidding and management strategy to identify and target events, product launches and conferences that have a strategic fit and match the strengths of Leicester; to ensure that hosted events are delivered to the highest standards and the full economic potential of all events staged and hosted is achieved.</td>
<td>✓ 2018/20</td>
</tr>
</tbody>
</table>

4 VisitEngland.org/marketing/businessvisits
High standards of customer service are essential in the tourism industry in order to preserve and develop a reputation as a first rate visitor destination.
People are the greatest asset in the tourism industry. Investment in skills and training and promoting tourism as a ‘first choice’ career or business opportunity are key priorities for Leicester and these will help create a workforce and industry that is capable of delivering a high quality tourism product in the city.

High standards of customer service are essential in the tourism industry in order to preserve and develop a reputation as a first rate visitor destination. The people, services and businesses that cater for the needs of visitors and of residents, play an important role in generating economic and social activity and increasing spending, whether in hotels, bars, pubs, restaurants and galleries, or in everyday events and day-to-day services that make a place clean, safe and welcoming.
National strategy
Nationally, the sector skills council, People 1st, aims to raise standards and transform the skills and professional image in the hospitality, passenger transport, travel and tourism sector. It has targeted improvements in the international perception and experience of the tourism sector’s ‘welcome and service’. People 1st is working with employers to agree endorsed professional standards, which will help raise the profile of job roles across the sector.

A Strategic Framework for Tourism in England 2010-2020\(^5\) highlights the need to increase visitor markets, to offer compelling destinations of choice, to champion a successful and thriving industry, and to facilitate greater engagement between the visitor and the experience.

Objective 18: To improve training and skills

<table>
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<tr>
<th>Key action areas:</th>
<th>Timeline</th>
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<tbody>
<tr>
<td>A Work with partners in the LLEP and training providers to identify skills gaps and ensure effective provision</td>
<td>✓ ✓</td>
</tr>
<tr>
<td>B Strengthen links between employers and skills providers to ensure needs and provision are matched</td>
<td>✓ ✓</td>
</tr>
<tr>
<td>C Undertake a local baseline audit of current tourism sector skill levels to identify priority areas for improvement</td>
<td>✓</td>
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</table>

Objective 19: To achieve service excellence

<table>
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<tr>
<th>Key action areas:</th>
<th>Timeline</th>
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<tbody>
<tr>
<td>A Improve perceptions of the industry and establish tourism and hospitality as a career of choice for people in Leicester and ensure support is in place to support access and development</td>
<td>✓ ✓</td>
</tr>
</tbody>
</table>

5 http://www.visitengland.org/strategicframework/
6 www llep org uk/sector_skills

Tomorrow’s Leaders
A key priority will be to develop a culture of service excellence across the tourist experience in Leicester. This will require leadership development in all aspects of management within the tourist industry.

Successful businesses require inspirational managers and leaders who nurture and value their staff and a skilled workforce delivering quality service in an industry providing first choice employment and career opportunities. A close partnership between education and industry will be strengthened to develop management excellence.

Another priority will be to improve perceptions of the industry and establish tourism and hospitality as a career of choice, through work with school and college career advisers, universities, local job and apprenticeship events, and the National Careers Service.
Vocational training and apprenticeships

Apprenticeships and traineeships offer an effective alternative education route for over 16 year olds. Apprenticeships offer ‘in work’ training in travel and tourism, hospitality, management, and many other areas that relate to the tourism sector. The Leicester Apprenticeship Hub\(^7\) will help to raise awareness of the value of apprenticeships to employers, schools, and city residents. Apprenticeships in the tourism sector will also be encouraged and developed in Leicester to improve potential staff’s understanding of tourism as a serious career option. Awards, certificates, diplomas, foundation degrees and degrees are available for local people to learn and gain qualifications within this sector.

It will also be important to work closely with schools and colleges to develop vocational training that strengthens the perception of tourism as a serious career option.

Objective 20: To develop vocational training and apprenticeships

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<th>Key action areas:</th>
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<tr>
<td></td>
<td>2015/17</td>
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<tr>
<td>A Support the development of further apprenticeship opportunities in the tourism sector</td>
<td>✓</td>
</tr>
</tbody>
</table>

\(^7\)www.leicester.gov.uk/leicester-apprenticeship-hub
Business and employment opportunities

Of equal importance is the creation of employment, career and business opportunities within the tourism sector. Tourism offers a wide range of opportunities in customer service, hospitality, food and drink, management, the artistic and heritage professions, and so on. This includes permanent, temporary and casual employment and self-employment opportunities.

The tourism sector is particularly important for providing employment opportunities for those trying to find their first steps into work, including school-leavers and young people, or those unable to work full-time. For example, nationally 44 per cent of people employed in the tourism sector are under 30 years of age and nearly half of the workforce in the sector is part-time.

The Leicester to Work range of initiatives such as Step-Up can also be used to further support unemployed people to give them an insight into this industry. The sector is also an incubator for entrepreneurs, despite the economic downturn, particularly in terms of providing supplies and services.

The LLEP Joint FE Prospectus was created to help local businesses by bringing together the entire college offer of courses, training and services, all in one place. Tourism and hospitality is featured within the key employment sectors.  

Objective 21: To create business and employment opportunities

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<th>Key action areas:</th>
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<tr>
<td></td>
<td>2015/17</td>
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<tr>
<td><strong>A</strong> Support job creation (permanent and temporary jobs and casual employment) opportunities within the tourism sector</td>
<td>✓</td>
</tr>
<tr>
<td><strong>B</strong> Ensure business support and guidance is available to support local businesses to maximise their ability to invest, grow, diversify and expand in the tourism sector</td>
<td>✓</td>
</tr>
<tr>
<td><strong>C</strong> Encourage closer working between the city council, LLEP, business and education sectors to explore ways in which employment and business opportunities can be developed</td>
<td>✓</td>
</tr>
</tbody>
</table>

http://www.llep.org.uk/collegebusinesssupport
The visitor journey

The other half of the people equation is the customer. Respecting the needs, desires and demands of the people who fuel the tourism economy is vital. Leicester will put customers at the centre of plans to drive growth in the tourism sector by embracing fully the ‘visitor journey® model adopted by VisitEngland.

The visitor journey approach recognises that people - the visitor - should be at the heart of tourism planning. To date, few destinations have truly embraced this approach and Leicester can develop competitive advantage by doing so. This will drive tactical plans to improve the product, accessibility, marketing and training in the city. It will be at the heart of activity to improve quality, customer contact, marketing, accessibility and training programmes.

Objective 22: To improve the visitor journey

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<tr>
<td></td>
<td>2015/17</td>
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<tr>
<td><strong>A</strong> Place the “visitor” at the heart of tourism planning and activities to</td>
<td>✓</td>
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<tr>
<td>improve quality in the industry, customer contact, marketing, accessibility</td>
<td></td>
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<tr>
<td>and training programmes</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td><strong>B</strong> Develop a quality mark for Leicester, that complements the quality mark</td>
<td>✓</td>
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<tr>
<td>being implemented in the county</td>
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© Live Tourism

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High quality and robust tourism intelligence is essential to understand Leicester’s product, place, positioning and people. It is also vital for investment decisions taken by tourism businesses and in assessing the value and impact of investment by the public sector to improve performance. A key priority in Leicester will be to re-evaluate existing tourism intelligence and look at ways of improving intelligence gathering, the use of market data and sharing results with the industry. The use of Open Data and crowdsourcing will play an increasingly important role in the future.

Information sharing and dissemination

A key priority will be to improve and achieve greater standardisation of the methodology and channels for information sharing and dissemination. Wherever possible, market data and intelligence will be provided so that it can easily be aggregated and used in multiple ways.

A review of existing research will be undertaken to ensure that it is appropriate and effective, useful, timely and relevant to all those involved in the industry.

The review will also assess current methods of sharing and communicating research and provide user friendly interpretation of the results for partners, industry and investors to ensure that it is accessible, useful, timely and relevant to all those involved in the industry.

There is a particular need to improve data on visitor perceptions, attitudes and satisfaction levels both prior to and following a visit which will support the Visitor Journey approach outlined in Theme 3 – People.

Measurement of tourism

There are many different sources of tourism statistics that use various methodologies and content. This has served to create a degree of confusion within the industry. The tourism figures reported for Leicester (as well as Leicestershire) are obtained using the Scarborough Tourism Economic Activity Model (STEAM), a bottom up model. STEAM is not designed to provide a precise and accurate measurement of tourism in a local area, but rather to provide an indicative base for monitoring trends.

A key priority for Leicester will be to co-ordinate market intelligence, research and development activities in the city and improve the accuracy of knowledge of the capacity and use of local tourism businesses. It will also be important to understand the demographics and psychographics of visitors. In view of this, new marketing intelligence will be commissioned, as well as campaign evaluation and a new customer satisfaction survey to shape and improve the tourism offer in Leicester and to identify who visits Leicester and who currently does not – their opinions/what they like/do not like.
There is also a need to monitor, evaluate and improve the performance of all public services that support, promote and inform tourism in Leicester.

This information will support the development of venues, attractions and facilities and help improve services. This improvement in local intelligence will also serve to improve the accuracy of the figures derived from a STEAM report that will be commissioned annually to monitor performance of the tourism industry in Leicester/shire.

Increased partnership working will be a key priority. This includes working with partners in the LLEP to develop a ‘demand forecast’, looking at trends and forecasts of what tourism in the city might look like in the next 10-15 years to shape future investment. It will also include working with Visit England, the LLEP, the county council and other partners to ensure high quality, reliable and timely data and intelligence is available to inform better investment decisions and policy making and to support tourism planning and promote growth.

Robust and accurate local tourism information is also an essential element in ensuring effective decision making in relation to the delivery of tourism services.

It is crucial in the following activities:

- marketing planning, programming and monitoring results
- exercising planning and development responsibilities, especially where European and other non-local funding is involved
- making realistic bids for central grant funding, including setting achievement targets that have to be measured
- devising effective visitor management plans for destinations and monitoring the results over time.
APPENDIX 1.
STRATEGIC AND LOCAL TOURISM CONTEXT

The size and importance of tourism in the UK economy is often underestimated and frequently referred to as the “invisible giant”. It rarely appears on the radar, mainly because unlike other industries, over 80 per cent of tourism businesses in the UK employ less than 10 people. However, tourism is actually one of the country’s most important industries, supporting thousands of businesses, both directly and indirectly, over a range of interdependent sectors including transport, retailing, sport, museums, galleries and the arts.

Tourism is also important in terms of the range of employment, career and business opportunities it offers, whether in customer service, hospitality, food and drink, management, or the artistic and heritage professions. This includes permanent, temporary and casual employment and self-employment opportunities. The sector is particularly important for providing job opportunities for those trying to find their first steps into employment, including school-leavers, young people or those unable to work full-time.

A key aim of this Tourism Action Plan for Leicester is to support the local tourism industry and lead to more successful and profitable businesses in the city, providing a vital source of new jobs. Growing tourism in Leicester will also create the potential ‘spin off’ of more local sourcing of supplies and services helping other businesses and increasing money circulating in the local economy. In some cases, tourism may help to support and sustain local facilities and services such as local shops and transport, culture, arts, heritage and sports facilities that might not survive if only reliant on local use.

Value of tourism for the United Kingdom

A report produced by Deloitte (2013)9, identified that since 2010 tourism has been the fastest growing sector in the UK in employment terms and was responsible for one-third of the net increase in UK jobs between 2010 and 2012.

The report estimated that the tourism economy in the UK was worth around £127 billion in 2013, equivalent to 9 per cent of the UK’s total GDP, supporting over 3.1 million jobs in the UK (equivalent to 9.6 per cent of all jobs in the UK) and 173,000 more than in 2010. The sector is predicted to grow at an annual rate of 3.8 per cent through to 2025 - significantly faster than the overall UK economy and much faster than sectors such as manufacturing, construction and retail.

Tourism spending in the UK was estimated to be £113 billion in 2013, of which £24 billion was from spending by international visitors and £89 billion by domestic residents. Inbound tourism is the fastest growing tourism sector – with spend by international visitors forecast to grow by over 6 per cent a year in comparison with domestic spending by UK residents at just over 3 per cent.

In view of its economic performance in recent years, the tourism industry is viewed as one of the key contributors to rebuilding the UK economy and for generating employment, especially among school-leavers and young people. Forty-four per cent of people employed in the sector are under 30 years of age compared to the national average of 24 per cent. Nearly half of the workforce is part-time, a significant source of employment for those unable to work full-time. The sector is also an incubator for entrepreneurs and, despite the economic downturn, there were 21,580 tourism business start-ups in 200910.

Value of tourism in Leicester and Leicestershire

Tourism makes an important and growing contribution to the economy in Leicester and Leicestershire. The latest research into the performance of the tourism industry indicates that in 2013, the value of tourism to Leicester and Leicestershire was £1.481 billion and with strong signs for future growth. The economic impact of tourism in Leicester in 2013 was £512 million, up from £483 million in the previous year.

For Leicestershire, the economic impact value was £969 million, compared to £913 million in 2012. There were 29.45 million tourists visiting Leicester and Leicestershire in 2013, which equates to 35.47 million tourist days. Tourism supported over 20,400 jobs in Leicester and Leicestershire in 2013.

- More than 730,000 overnight stays were spent in commercial serviced and non-serviced tourist accommodation.
- Over 3.6 million nights were spent staying with friends and relatives in the city.
- Overnight visitors spent over £234 million in Leicester and day visitors a further £278 million.

9 The Tourism Alliance, 2012
10 The Economic Contribution of the Tourism Economy in the UK, Deloitte, November 2013
11 State of the Nation Report, People 1st 2011
1 Scarborough Tourism Economic Activity Monitor (STEAM), 2012
Day visitors account for just over half of the total tourism expenditure in Leicester.

Business tourism accounts for the most overnight stays in serviced accommodation in the city.

Leicester enjoys a higher than average impact from overnight stays generated by people staying with friends and relatives (SFR).

About 5,400 full-time equivalent jobs are supported by direct tourist expenditure and a further 1,500 jobs are supported by indirect tourism revenue.

Leicester offers 31 establishments providing serviced accommodation, a total of 3,181 bed spaces. The city also offers 253 bed spaces in 102 self-catering properties and over 2,000 academic bed spaces that are available at certain times at the city’s two universities.

The average total economic impact per night for visitors staying in hotels and guest houses in Leicester was £115.

The average daily economic impact of visitors staying with friends and relatives was £45 and for day visitors £34.

While the number of day visitors and the number of overnight stays in serviced accommodation (hotels, and so on) remain broadly constant throughout the year, the number of people staying in non-serviced accommodation (self-catering) is markedly seasonal, rising from a low in January to a peak in August.

Future trends in the national and local tourism industry

There are a variety of changes and challenges impacting on the tourism industry and many others that may exert an influence on the face of tourism in the future. This Action Plan has sought to take account of these changes, where appropriate, in determining the relative priorities and actions to be undertaken in the city. The main changes are:

- **Changes in leisure time:** Some people are working longer hours and though “cash rich” are “time poor”; some people are retiring earlier with more disposable income, while others fear they won’t be able to retire until much later than planned; some have longer holiday entitlements. Leisure time is an important determinant of holiday and short breaks.

- **Ageing population - nationally:** The number of people in Britain aged 65 or over is increasing rapidly - by 2015 they will outnumber the under 16s for the first time. This older population is likely to be more active, in better health and with higher disposable income than previous generations.

- **Younger population – locally:** Leicester has a youthful population. The 2011 Census, identified 21 per cent of Leicester’s population as under 16, (compares to an England average of 18.9 per cent). The biggest age group in the city is 20 to 24-year-olds, which make up 35,400 people.

- **Increase in short breaks:** this is partly as a result of the pressure on time, growth of the ‘cash rich, time poor’ sector, huge range of low cost airlines and developing tourism destinations close to home. Sampling new activities and skills is a growing short break choice.

- **Increased segmentation:** Not everyone wants a traditional city break or a sun, sea, sand holiday. Motivations for going on holiday are changing and consumers are becoming more demanding. There are already packages which focus on sports tourism, health spas and relaxation, food and drink, heritage and films. There is likely to be demand for an ever increasing range of different types of holiday.

- **Sustainable tourism:** There is a growing awareness of the impact of visitors on host destinations. Sustainability and ethical considerations will be increasingly important.

- **Holiday booking methods:** A major change has been the increase in independent-holiday planning and the substantial growth in online research and booking. Many people will continue to book packages with established tour operators but as more products and level of detail continue to become available online, this is rapidly becoming the method of choice for most consumers.

- **Needs of disabled people:** The Equality Act 2010 is now in force so it is not only illegal to ignore this important segment but more tourism providers are likely to realise the economic and social benefits of focusing more on disabled people. A key priority will be accessibility – in terms of pedestrianisation, safe, secure environment, signage and so on.

- **Improved quality:** Consumers are becoming more discerning, demanding better quality. VisitBritain and others are working to remove some of the confusion about accommodation grading systems in order to make them easier to understand.

- **Fear of rising interest rates:** Recent research undertaken by Visit England has indicated that whilst consumer confidence has risen due to a decline in the fear of unemployment, it is being replaced by a fear of rising interest rates. This indicates that consumers will remain cautious for the foreseeable future, indicating the need to continue to provide value-driven products.
The tourism offer in Leicester is enhanced significantly by the city’s location and accessibility. The key strengths are:

- 26 million people live within a two hour drive of Leicester
- significant transport links with Leicester just over an hour from St Pancras International, London
- the greatest frequency of trains of any East Midlands location
- links to the Europe via the Channel Tunnel are available from the same London station
- cross country links to Birmingham, Peterborough and beyond
- close proximity and good connections to two M1 junctions
- strong cross-country links via the M69, M42, A50 and A47
- the benefits of two airports with connections across the world.