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1. EXECUTIVE SUMMARY

The 2002 Visitor Development Strategy initiates a process to facilitate and guide the development of tourism in the city over the next 5 years and is designed to relate closely with other strategic development plans in place in and around the area.

The first stage of this process is scoping the issues and identifying a series of 'challenges' to guide further consultation and the development and delivery of action plans.

The challenges have been devised through a process of initial consultation with a cross-section of organisations listed in section 12. However, the challenges are also influenced significantly by the industry expertise of Leicester Promotions and its partners. Leicester Promotions, since 1993, has been contracted by the City Council to guide and deliver tourism and promotional services on behalf of the City.

This document also examines progress since the last Visitor Development Strategy in 1999, considers the current tourism industry both locally and nationally, and explores a series of key subjects, including:

- **The Public Face of Leicester** – This section examines the major issues of image and branding, as well as considering the perceptions and awareness which visitors have of the city and its 'offering'.
- **The Visitor Experience** – This looks at the current experience offered to visitors by the city as measured through recent research, and explores the key areas of information, transport and access.
- **The Leicester Product -** The third section provides a summary of the current 'Leicester offering', looks at new developments in and around the city, and outlines the proposal for a Tourism Corridor for Leicester.
- **Visitor Marketing and Promotions –** This section considers the current marketing and promotion of Leicester as a visitor destination, and explores both existing and potential new markets.

Within each section, a number of key issues are identified and a programme of objectives established which it is envisaged will be adopted by the identified lead agency and carried forward into action plans for delivery over the next five years.

This inevitably will help link the work of industry partners including Leicester City Council, Leicestershire County Council, the accommodation sector, regeneration schemes and local attractions. It will also provide direction and a clear focus for the work of Leicester Promotions.

2. THE STRATEGY PROCESS AND CONTEXT

2.1 STAGE ONE

This document is the first of three stages. The work undertaken to date and reported here provides an overview of areas for development in stage two. The key issues are expressed as a series of challenges. Consultation to date has been at a strategic level and will be widened during stage two.

2.2 STAGE TWO

A series of action plans will be developed during stage two in order to address the issues identified in the challenges. Action plans will be drawn up by a wide-range of partners across all sectors of the City's community.

The action plans will identify which organisations will take the lead for delivery and will start to identify costs and funding sources, time scales and lead bodies.

2.3 STAGE THREE

Once agreed and signed-off, the action plans will move to the delivery stage. This stage will last until action plans are completed and will include regular monitoring and progress report.

2.4 PROCESS MANAGEMENT

The process will be managed by Leicester Promotions, under contract to the City Council. Development and delivery of action plans will involve a number of bodies, including the City Council. Leicester Promotions will work closely with all partners to identify and secure resources to implement action plans.

Any action plans which have an impact on the budgets of City Council departments will be presented through the agreed internal processes by the relevant lead department for debate and authorisation.

3. 1999 VISITOR DEVELOPMENT STRATEGY

3.1 SUMMARY OF ACHIEVEMENTS

Since the last Visitor Development Strategy in 1999 a number of actions have been achieved. These are summarised below.

Some of the outputs are now an integral part of the City Centre Management Board's (CCMB) Action Plan. CCMB was formed in 1999 in partnership with Leicester Promotions and was itself an output of this strategy.

- **Expand and enhance Leicester's Retail Offering** - This is now an integral part of the City Centre Management Board's (CCMB) strategy. Widely reported development opportunities for the Shires, Haymarket and Leicester Market among others indicates considerable progress in this area.
- **Develop lead agency for City Centre Improvement** - City Centre Management Board formed.
- **Decorative Improvements to Problems Areas** - Included in the CCMB strategy.
- **Improve Leicester's Status for Live performance -** Arts Strategy completed; Changed programme at DMH including extension of Philarmonia and outdoor events improved - e.g. BBC Music Live, DMH uncovered series. Leicester is developing a considerable reputation for both world music and out door music.
- **Review Belgrave Strategy for Visitor Potential** - LPL is a lead partner in the SRB 6 Belgrave Heartland programme, leading on specific tourism objectives. This activity includes visual improvements, marketing, entertainment and the development of effective tourist information services in the Belgrave Quarter.
- **Review CCAP for Visitor Potential** - Completed, with the set-up of CCMB and the development of a new City Centre Strategy with much greater emphasis on the importance of external visitors.
- **Improve first impressions of Leicester** - CCMB taking a lead for city centre. Still a requirement to pick up outer areas.
- **Develop Network of Visitor Orientation Points** - Included in new City Centre strategy.
- **Re-design Maps and Guides to a standard format** - Completed by LPL.
- **Develop New Visitor Welcome Centre -** Work in progress. Lease for current TIC in Every Street expires in 2003.
- **Undertake Hotel Demand Study** - Completed by LPL.

4. 2002 VISITOR DEVELOPMENT STRATEGY

4.1 THE CHALLENGES

The strategy sets a series of challenges for the development of the tourism industry in Leicester over the next 5 years and aims to ensure that tourism development issues enjoy a higher priority in the work of all leading agencies.

The Visitor Development Strategy is designed to be integrated with existing development plans. (see section 4). It is envisaged that it will help to link the work of industry partners including Leicester City Council, the accommodation sector, regeneration schemes and local attractions. It will also provide direction and a clear focus for the work of Leicester Promotions, the city's tourism and place marketing agency.

4.2 STRATEGIC AIMS

1 To fully exploit the potential of tourism activity to contribute to the physical and economical regeneration of the city.

2 To create an agreed vision for tourism in Leicester - developing a partnership and shared approach to work together with a single purpose.

3 To develop the quality and range of tourism activity and opportunity in Leicester in sustainable ways.

4.3 GUIDING PRINCIPLES

1. Capitalise on trends for regional and national growth in tourism industries sector
2. Maintain and develop a proactive approach and a "Can do" attitude
3. Proactively learn and share best practice
4. Develop meaningful working partnerships and greater cohesion
5. Dovetail local and regional strategies to ensure an efficient and effective use of joint resources
6. Ensure that tourism development considers the needs of all potential visitors.

5. LOCAL CONTEXT

5.1 DIVERSE CITY – A Cultural Strategy for Leicester

The Cultural Strategy provides an overarching framework to encourage people from across Leicester to work towards the cultural development of the city. It focuses specifically on the ways in which culture and cultural services can change the city and is built around a series of challenges and objectives. The Visitor Development Strategy relates to a number of key challenges and is closely linked to objectives 1, 4 and 5:

- Objective 1 – 'To celebrate, promote and build on the fact that the city's culture is defined by the diversity of its people's cultures and to increase respect and understanding for the integrity of each of those cultural traditions.'
- Objective 4 – 'To create a city centre which exemplifies the richness of the city's cultural diversity and which is accessible and welcoming to all.'
- Objective 5 - 'To exploit fully the potential of cultural activity to contribute to the economic regeneration of the city.'

The cultural mix of Leicester is considered fundamental to helping visitors and potential visitors to understand and experience what makes the City unique. While there are specific references to this throughout the visitor development strategy, this must be seen as part of the whole, underpinning everything. Without pre-empting the outcome of image and product development work, it is expected that reflecting and celebrating Leicester's cultural diversity will provide a major influence to such activity.

As project leaders, Leicester Promotions will ensure a wide-range of action plans which help to promote and celebrate diversity in response to the agreed challenges. These will be drawn-up in consultation with partners across the City. Leicester Promotions are represented on the Executive of the newly formed Cultural Strategy Partnership and this link will maximise cross-fertilisation and synergy between all initiatives.

5.2 COUNTY TOURISM STRATEGY

The Leicestershire Tourism Strategy will guide Leicestershire County Council's tourism policies in partnership with the private and voluntary sector providing a framework for action for all stakeholders in the tourism industry. It will give clear direction on the approach to the delivery and development of tourism over the next five years. The strategy builds upon the achievements of the previous Leicestershire Tourism strategy published in 1995.

The Strategy also establishes a framework from which other local authorities in the county can develop their own local area tourism strategies and action plans, hence, the Visitor Development Strategy which will be integrated with the County strategy to form the 'Leicester City' element.

5.3 LEICESTER REGENERATION COMPANY

The Leicester Regeneration Company was set up in April 2001 to work with the private and public sector in developing and revitalising specific areas of the city. In fulfilling this role, the company will help to promote and improve the image of Leicester both regionally and nationally. Its operational area extends to about 400 hectares, taking in most of the City centre and including four priority areas.

- **St George's** - the focus of the cultural quarter, which is planned to become a thriving area of mixed residential, employment and arts uses built around a new theatre.
- **Frog Island** – an area with great potential for both refurbishment and new build, especially along the river.
- **Abbey Meadows** - the area around the National Space Centre which may be developed as a science park with a mixture of riverside housing and leisure facilities.
- **The Old Town** - including De Montfort University Campus and part of the Riverside with the medieval core of the city.

The Regeneration Company has commenced the development of a master plan to focus regeneration in the City over the next few years. In delivering the Visitor Development Strategy, Leicester Promotions will be looking to maximise the role of tourism as part of the overall regeneration process.

In particular, the ambition of the Visitor Development Strategy is to explore the possibility of the riverside corridor from The National Space Centre, through Abbey Park, the Old Town and then into the City Centre through to the new Cultural Quarter being given particular emphasis for tourism and leisure development.

This is explored further in Section 9.

5.4 CITY CENTRE MANAGEMENT ACTION PLAN

Leicester City Centre Management - formed in 1999 in partnership with Leicester Promotions - is a private, public and voluntary sector partnership.

The City Centre Action Plan is a blueprint for activity providing a focus on key issues which require immediate action for achieving recognition as a go-ahead and striving city of the new millennium, and dovetails with the individual strategies of its partner organisations.

The Action Plan's vision is ambitious and wide ranging with a number of themes, which link closely with aspects of the Visitor Development Strategy, in particular; Access and Signage, Marketing and Promotions, Regeneration and Development and Environment.

6. INDUSTRY CONTEXT

6.1 NATIONAL TOURISM

The United Kingdom Tourism Survey (UKTS) defines domestic tourism as visits by UK residents to England and can be analysed in terms of trips, nights and spend.

An analysis of domestic tourism nationally between 1990 and 1999 shows those domestic trips increased by 59% and nights by 27%. The levels of spend also increased but did not match the growth in nights and trips increasing by 21% (at 1999 constant prices).

The key trends emerging from the analysis of the domestic market during this period are:

- **a spectacular increase in visit friends and relatives trips(VFR)**
- **a movement towards short 1-3 night trips (61% increase compared to 14% decrease in 8+ night trips)**
- **the rising predominance of trips to towns and cities over other locations**
- **an increase in leisure day visits (Leisure Day Visits Survey)**

Additional research carried out specifically on the domestic short breaks market by the British Cities Marketing Board in November 2000 (appendix 8) shows that:

- **over 30% average at least 2 short breaks a year**
- **82% had taken a short break in a UK city in 2000**
- **24% said their main reason for taking a break was to Visit Friends and Relatives**
- **17% like to go shopping while taking a short break**

Inbound tourism is measured via the International Passenger Survey (IPS) and a simple analysis of the data available between 1990 and 1998 shows that inbound trips to England increased by 33%, spend increased by 23% and the number of nights increased by 14%.

(Source: Perspectives on English Tourism – English Tourism Council 2000)

The tourism industry has recently been influenced by major external factors, including the foot and mouth epidemic and the events of September 11th in the USA. The long-term effects on UK tourism are difficult to predict, although there have already been reports of group and conference business cancelling and significant drops in hotel business and air travel.

Research carried out immediately after the event suggests that any downturn in outbound tourism may potentially be displaced to the domestic market.

6.2 LOCAL TOURISM

Domestic tourism in Leicestershire between 1994 and 1999 has also been increasing as can be seen below.

							% Change
DOMESTIC	**1994**	**1995**	**1996**	**1997**	**1998**	**1999**	**1994-1999**
TRIPS – UK Residents – Trips in Millions							
Leicestershire	1.0	1.1	1.5	1.5	1.9	1.8	80.0%
NIGHTS UK Residents – Nights in Millions							
Leicestershire	2.9	3.0	3.8	3.7	4.2	4.1	41.4%
SPEND – UK Residents – Spending in Millions £							
Leicestershire	£90	£73	£141	£101	£87	£121	34.4%
OVERSEAS							
TRIPS – Overseas Residents – Trips in Millions							
Leicestershire	0.17	0.20	0.17	0.22	0.18	0.18	5.9%
NIGHTS - Overseas Residents – Nights in Millions							
Leicestershire	1.4	2.1	1.2	2.1	1.6	2.0	42.9%
SPEND - Overseas Residents – Spending in Millions							
Leicestershire	£44	£96	£48	£81	£66	£62	40.9%

(Source: Heart of England Tourist Board)

The Leicester Visitor Survey (appendix 2) conducted during 2000 identified that some 84% of visitors to the city are 'marginals' on day trips from Leicestershire and neighbouring counties. Shopping continues to be their primary purpose, accounting for some 75% of spend, with drinking/eating-out the second at 15%.

Of the remaining 16% non-marginal visitors (domestic and overseas):

46% were found to be staying for 1-3 nights and the remainder for 4 nights or more.

- **59% of these were visiting friends and relations**
- **shopping accounted for the most significant proportion of spend for both domestic overnight visitors (28%) and for overseas overnight visitors (43%)**

Future planning requires more specific marketing intelligence to be available, especially the ability to benchmark Leicester's performance against identified competitors. This benchmarking data will be needed to compare both the effectiveness of marketing activity and the quality and range of services and facilities available to visitors. As such data is currently unavailable, its collection and collation needs to form part of the action planning process in stage two.

CHALLENGE

1	Develop mechanisms for measuring external perceptions of the City in relation to identified competitors and providing business intelligence to shape and advise future initiatives.

7. THE PUBLIC FACE OF LEICESTER

7.1 IMAGE AND BRANDING

Leicester's Cultural Strategy 'Diverse City' – a vision for cultural life in Leicester highlights some of the local issues relating to the image of the city. Whilst the strategy focuses heavily on the city's own inhabitants and communities, its outcomes will inevitably reflect on the perceptions of visitors.

A new debate on the issue of branding and identity is now underway, with Leicester Promotions involved in development work with other key organisations including the city council, the city's universities, sporting venues and local businesses and communities. The challenge will be to agree and establish a cohesive branding for the city, which can be used by partner organisations, providing synergy across a range of activities.

Perceptions of Leicester are fragmented and, for some time the city has lacked cohesion in its identity by the lack of a unifying brand, marketing proposition or call to action. Awareness of the city's 'offer' for visitors is also low, largely because of the fragmented approach towards profiling the city and lack of investment in national promotional campaigns. It is important to appreciate the lack of appeal of unknown destinations, and fear of the unknown is often the reason for never considering a first visit.

Some of the findings from the Marginal Visitor Survey (appendix 1) include the fact that:

- Knowledge about the city is scarce, very fragmented and is likely to be out of date and incorrect.
- Leicester City centre is not perceived to be on a comparable level of quality to some neighbouring destinations. Images still prevail of Leicester as a bland, grey, personality deficient place.

The Leicester Visitor Survey revealed that, for 20% of overseas visitors and UK overnighters, a visit to the city had exceeded their expectations. This represents a significant proportion who had either a poor perception or no perception of Leicester prior to their visit.

CHALLENGE

2	**Examine the image of the City and mobilise all sectors in support of an agreed representation of the Leicester 'brand.'**

8. THE VISITOR EXPERIENCE

8.1 CONTEXT

Public expectations are rising all the time and any shortcomings in the way a destination manages and welcomes its visitors are reflected in the level of visitors satisfaction, which in turn influences future visits, length of stay and recommendations to other potential visitors.

8.2 THE CURRENT EXPERIENCE

Recent visitor research has shown that first impressions of Leicester are generally favourable with 40% of those interviewed rating their immediate impression as good and 6% very good however, just under half (49%) rating it as average and 4% felt the city to be poor or very poor.

When asked to rate their overall enjoyment of their visit to Leicester over half (55%) rated their enjoyment as average, with a further 35% rating their enjoyment as high and 7% as very high. Only 4% of visitors rated their enjoyment as low or very low.

However, 23% commented on some of the negative aspects of the city, which included dirty streets, beggars and drunks, litter/chewing gum, and traffic/noise pollution.

This is further reflected in the results of the Leicester destination benchmarking survey (appendix 3), which highlighted that the city is level or slightly above the averages for shopping (range of shops) and range and quality of places to eat and drink. However, it falls below the national large towns and cities benchmark average for:

- Ease and cost of car parking
- The provision and cleanliness of public toilets in the city centre
- Quality of service and value for money at accommodation and attractions
- Upkeep of parks and cleanliness of streets
- Feeling safe from traffic and crime.

The requirements of disabled visitors need to be reviewed. Through thoughtful and imaginative development strategies, Leicester has an opportunity to become a market-leader in maximising opportunities presented by the massive and largely untapped audience of people with disabilities.

8.3 INFORMATION

Visitor Centre

Visitors need to feel that the City's approach to information provision is co-ordinated, and Leicester is proud to have been the first city in the UK to establish a public Information Bureau, which it did in 1936.

Since this time, Leicester has always been at the leading edge of Tourist Information Centre provision and indeed has been the recipient of regional awards in recent years.

The existing Tourist Information Centre is not ideally placed but a new Visitor Centre in a major High-Street location with a heavy footfall would be of greater benefit to visitors. It should be a genuine one-stop shop but be clearly and totally focused on improving the experience of visitors to the city be they day trippers, staying visitors or even residents of the suburbs of Leicester who are visitors to the city centre.

The city's ambitions are to remain at the leading edge, and further recommendations for the development of Leicester TIC into a Visitor and Information Centre can be found in appendix 5.

Visitor Information Points

A further issue exists with regard to the number of places that comprehensive information is available in the city, both in the form of leaflets, maps and information provided at visitor information points. Possible locations for consideration might include Libraries, The National Space Centre, City Museums, Theatres and the Cultural Quarter.

The City Centre Management Action Plan highlights the need for greater provision at key access points to improve pedestrian movement and visitor knowledge.

Signage

As part of on-going maintenance and renewal of signage around the city, information should be sought to assess how effectively current schemes manage and influence visitor flows around the City Centre.

8.4 TRANSPORT AND ACCESS

The Central Leicestershire Transport Plan sets specific objectives for the future development of local transport (appendix 7) and features a range of elements which, when bought together, aim to create a seamless integrated system across the city. Whilst the plan does not specifically consider the impact on tourism, the changes and improvements to local transport policy and provision will inevitably benefit the overall visitor experience.

As the local transport plan is implemented, the subject of travel within the city, to and from visitor attractions must also be kept high on the agenda. The success of the Discover Leicester tour in 2001, particularly in linking the city centre to the National Space Centre and other attractions, has demonstrated a clear market need for specific visitor-orientated journeys and provision.

CHALLENGES

3	**Review levels of Visitor Satisfaction with all aspects of the visitor product and agree strategies to address identified weaknesses.**
4	**Examine access to the city and its facilities in the broadest sense and agree strategies for sustainable improvement.**

9. THE LEICESTER PRODUCT

9.1 CONTEXT

The first two themes of this strategy concentrate largely on issues related to getting people to the city and ensuring the high quality of the overall experience. However, the quality and extent of Leicester's product - the attractions, accommodation, retail offering etc. are equally important.

9.2 THE CITY CENTRE

As part of the previous Visitor Development Strategy the City Centre Management Board has been developed to more effectively manage the city centre product. Issues relating to the city centre have been more closely examined and developed in the 'City Centre Management Action Plan' which will complement the work of this strategy.

9.2.1 Retail

Retail is a major part of the Leicester visitor offer, and the city currently occupies a top 10 position in the UK for its retail provision. This was re-enforced by the HETB Visitors survey where 35% found the shops its most appealing feature.

Shopping clearly brings large numbers of people into the city, but with the average length of stay being no longer than three hours, it would appear that it is mostly marginals who are not exploring the city further. A clear opportunity exists to not only attract more people but to also extend their length of stay into the evening.

9.2.2 Leisure and Eating Out

Over the last five years, Leicester's nightlife scene has changed beyond all recognition, and it is developing a regional reputation for the quality and quantity of its bars, clubs and pubs. Top UK DJs often feature in the city's clubbing scene, and these attract visitors from the 18-35 age range in increasing numbers, not only from the marginal areas, but from further afield.

The city also has an abundance of eating establishments, which has also been growing rapidly over the last few years. These include fast food outlets, cafes and restaurants offering cuisine from all corners of the globe. Whilst their menus are varied, they appeal to the younger market and Leicester's large student population, few are family orientated - many do not allow access for children – or appeal to the older grey market.

Other city centre issues raised during consultations include:

- The city centre at night is largely perceived as exclusively for those aged 18-30.
- The need to create more ambience in the city centre – perhaps through the use of street entertainment and events.
- The changing demography of the city needs to be considered in the future development of the city centre.

9.3 ATTRACTIONS

In the tourism industry, attractions are generally viewed as either primary or secondary attractions. A primary attraction is one that will attract in excess of 100,000 visitors a year, from at least a sub-regional geographic base who will be motivated to visit by that attraction alone. A secondary attraction is one that will normally attract less than 100,000 visitors a year and these will be visitors who use the attraction to complement and add value to a wider visit rather than having made a special journey to visit that attraction.

Leicester's primary attractions, The National Space Centre and New Walk Museum should be seen as catalysts for further developments. Abbey Pumping Station has, for example, identified itself as a secondary attraction and has successfully capitalised on the Space Centre and its visitors.

Secondary attractions are more numerous and include museums, parks and gardens. With the exception of the Great Central Railway, few of these individually represent a significant draw to visitors although some have particular appeal to niche markets.

The overall mix of attractions and their target markets needs to be constantly reviewed to maintain competition. This will sit closely alongside the benchmarking activity discussed earlier.

9.4 EVENTS AND FESTIVALS

Leicester is becoming renowned for its festivals and events activity. From events such as BBC Music Live, the Comedy Festival and One Big Sunday, to culturally specific activities such as Diwali, Caribbean Carnival and the Belgrave Mela. In total the city hosts in excess of thirty festivals each year, attracting local, national and international audiences.

The wide range of activities exemplifies the cultural diversity in the city and has great potential to attract new visitors to Leicester in the future. Currently however, individual festivals tend to work in isolation, with little integrated thinking or promotion. Developing an annual festival programme as part of the Leicester product will require a much greater degree of co-operation and co-ordination across the city.

Regional Links will be established with the co-ordinators of a festival study currently being conducted for EMDA & East Midlands Arts by De Montfort University. The study aims to identify visitor profiles, potential funding sources and make recommendations for priorities for action to promote economic growth through tourism activity generated by festivals and events. Leicester Comedy Festival is one festival being put under the microscope.

9.5 ACCOMMODATION SECTOR

As a direct result of the last strategy, Leicester Promotions in 1999 commissioned a hotel demand study, its main purpose to examine existing hotel stock, comparability with neighbouring cities and potential for future developments. The main findings can be seen in appendix 4.

Since then there have been a number of developments including the refurbishment of some of the city's 3 and 4 star establishments, and the opening of the 94 bedroom budget Hotel Ibis. Plans are also in place for further budget accommodation at the new football stadium and the potential for a four star hotel and casino at Vaughan Way/Highcross Street.

The Hotel Demand Study should continue to provide information to potential developers to inform their development projects and consideration should be given to renewing the study within the next three years.

9.6 BUSINESS TOURISM

Leicester successfully caters for small to medium size conferences. New venues for conferences developed in 2001 include the National Space Centre and the High Point Conference facility. In addition to these, the new Leicester City Football Club Stadium opening in August 2002 will have extensive state-of-the-art conference, banqueting and exhibition facilities. This will enable us to attract larger conferences with at total capacity of 1500 and maximum single conference capacity of 600.

The industry must now work together with a proactive and confident approach to fully exploit these new facilities.

9.7 NEW DEVELOPMENTS

A key ambition of this new strategy is to promote the status of tourism as a driver for social, physical and economic regeneration in the City. During the second phase of the process, the development of action plans, great emphasis will be placed on placing tourism development at the heart of all other appropriate strategies and plans. A particular opportunity is available through the work of the newly formed Leicester Regeneration Company.

The LRC has already identified a wide corridor running through the City for its masterplanning exercise. Much of the northern sections of this corridor reflect those areas which offer potential for improving the City's tourism offering.

9.7.1 Cultural Quarter

The Cultural Quarter is the next major project for the city and the proposed development will assist the regeneration of the St. George's quarter of the city. The aim of this development will be to provide a 'cultural production house' for the East Midlands, and a regional flagship for cultural investment and cultural industries. The whole environment will be enhanced in particular the development of public spaces to include public art, signage and landscaping works.

The development, which will begin in 2002 and will take 8 years to complete and will provide the city with new facilities including supporting development of new bars and restaurants and those detailed below:-

1. a new theatre and performing arts complex
2. a film and media centre
3. a contemporary visual arts centre with increased space for major exhibitions
4. creative production facilities
5. a 450 seat music venue

9.7.2 Belgrave Heartland

The Belgrave Area has recently been awarded £3 million of central government money (SRB). The programme, 'Belgrave

Heartland', will make a significant impact on the Belgrave community through until 2005 by adding to its economic vitality and cultural diversity.

Culture and Tourism is one of the key themes identified and the main objective of this theme is to develop and consolidate Belgrave as the premiere multicultural tourist centre of the region. This will include activity to increase awareness of the area to visitors as well as developing the quality of the experience. It will bring together many aspects of the diverse Asian heritage and lifestyles to enable the area to be seen as a central site of Indian sub-continental culture.

Sensitive development of this area is essential, to ensure that the rights of locals are respected, transport issues resolved and that the benefit to the area can be seen through economic development. Belgrave will become a core part of the proposal to develop a 'tourism corridor' for Leicester.

It is hoped that Belgrave will further be able to benefit from an Objective 2 bid. Potentially £600,000 of European funding will be available to enable additional activity to be undertaken, adding value to the Culture and Tourism theme of SRB6.

9.7.3 Leicester City Football Stadium

Not only will the new stadium be the home of Leicester City Football Club but as detailed earlier it will provide large capacity conference and exhibition space which the city has lacked considerably.

9.7.4 New Retail/Leisure Proposals

Development opportunities exist linked to Leicester's two main retail centres. Both the Shires and Haymarket have announced ambitious development plans.

CHALLENGES

5	**Explore the role of festivals and the part they play in enhancing the visitor experience.**
6	**Maximise the impact of existing and new regeneration and development opportunities on the City's tourism potential.**

10. VISITOR MARKETING AND PROMOTIONS

10.1 CONTEXT

The marketing and promotion of Leicester as a visitor destination presents all concerned with serious challenges. Over the last few years, financial pressure in the public sector has led to a decrease in the funding available for tourism promotions in addition, the lack of a unifying brand have contributed to the city achieving a lower profile on the national stage than it deserves. Leicester Promotions' role in tourism marketing is gaining increased levels of support from industry partners as it is now being recognised that, if the city is to gain higher profile as a visitor destination, greater synergy, co-operation and investment is needed across the sector.

Although the approach adopted by Leicester Promotions over the last five years has been largely customer led, limited resource has been available to fully exploit the potential of all domestic and overseas markets. The company has aimed to maximise its return on marketing investment by operating a limited number of highly focused and directed promotional campaigns at clearly identified market segments for example the highly successful 'Taste Of Asia' weekend breaks.

However, in order to continue to maximise opportunities in this area, further research into current and potential market segments is required in order to develop the city's product and ensure that it is packaged appropriately.

10.2 MARKET SEGMENTS

10.2.1 Marginal Visitors

The HETB Visitor Survey of Leicester highlighted that the city's main type of day-visitor is predominately the 'Marginal', i.e. those visiting from within Leicestershire and its margins, whose main purpose for visiting is shopping.

Attracting the Marginal visitor to the city is an ongoing priority and they form an effective yardstick for testing the strength of appeal of Leicester. Build a product that matches their needs and the staying visitor will also be attracted - the latter being more open to influence by effective marketing and promotion.

There is scope to further develop this market through ongoing partnership work between Leicester Promotions and Leicester City Centre Management.

10.2.2 Independent Visitors

It is clear that there is great potential for the city to develop and increase levels of business from the independent overnight visitor market. Significant investment has been made in recent years by Leicester Promotions and partners to achieve some success with this audience.

As a developing market it will inevitably continue to need a higher level of investment, sustained over the next 3-5 years to build on the opening of the National Space Centre. The Space Centre is unlikely to generate significant levels of leisure break business for the city by itself, but will hopefully provide the catalyst for the further development of Leicester's visitor product. This, along with the other recommendations in this strategy if implemented, will lead to a new era of opportunities for short-break and other leisure tourism in Leicester.

10.3 MARKET DEVELOPMENT

This section looks at target markets in Leicester which are known to be active, but require further research to clearly identify the current situation and enable the market to be developed.

10.3.1 Coach Tourism

Based on information collected via the United Kingdom Tourism Survey, the English Tourist Board estimates that the coach industry contributes some 5% by volume of all domestic holidays and leisure day trips and some 8% of leisure visits to day visitor attractions.

Leicester Promotions has continued to target the coach market and with the opening of the National Space Centre this continues to be a high priority. However, to target this group effectively more needs to be done to identify the current situation of coach tourism in Leicester i.e. how many coaches visit, who they bring, why they visit and the estimated length of stay.

What we do know is that facilities currently available within the city are not of a standard sought by many operators. The coach market is unique in the respect that the coach drivers have considerable influence over operator's decision making process and it is therefore the coach driver, who will visit and park his coach in a city, who's impressions must be targeted.

The primary concern of any operator/driver is security of their vehicle whilst parked. The Space Centre currently has parking for approximately 10 coaches solely for use by those visiting the centre. Currently, Leicester has only one coach park that services visitors to the city, First Leicester Bus Depot, which is approximately 1.5 miles outside the city centre.

In a recent report published by Bristol and Bath Tourism, a number of points were highlighted as being paramount to the success of its coach tourism development. (appendix 6). Whilst the context of these cities may differ from Leicester, the principle requirements for coach operators remain consistent.

10.3.2 Sports Tourism

Although the effect of relative successes of the City's individual sports teams can have an impact on national profile, there is still a strong association between Leicester and sporting success.

Discussions have already commenced to develop joint activity between the major clubs that will add a new dimension to Leicester's reputation for innovation in sport and to develop tangible and pratical steps to cement the City's status as a sporting capital.

10.3.3 Conference / Business Tourism

Conference and business tourism still generate the largest tourism income for Leicester. However, there is still a need to further research and understand the business tourism market.

The opening of the new football stadium presents Leicester with a unique opportunity to attract the larger scale conference business which, for many years, it has been unable to fulfil. The city now needs to work closely with LCFC to fully exploit this new facility.

10.3.4 The Family Market

As identified earlier in the HETB research, Leicester is in danger of becoming very limited in its appeal to the important family market.. The targeted exhibitions and activities such as 'Monster Creepy Crawlies' and 'Fangs' at the city's museums and the arrival of the National Space Centre, although successful, is still fragmented in its approach to a total 'family experience'. This is compounded by the lack of a family friendly culture within the city centre. A successful family friendly city centre has a range of family orientated facilities which may include a cinema, a leisure centre, sports facilities and specific children orientated attractions.

Strategically, this market place has been identified as core to key plans within the city; The Heritage Strategy and Museums Strategy will assist the development of a unified framework for future development and delivery. In addition to the development of the core product, new developments such as the Cultural Quarter will provide an improvement to the current offering, including dedicated green play areas and family orientated activities and shows. The Cultural Strategy also identifies the need to develop a family-friendly culture within existing food and leisure outlets in the city centre.

In the medium to long term this strategic approach will enable the city to fully exploit the family market segment. In the short term, the city needs to capitalise on and better package the current offering to the family market. The opening of the National Space Centre is an ideal catalyst to re-examine the needs of this market, and potentially enlarge the 'offer' through greater collaboration with not only existing attractions but also with attractions and facilities in the county.

10.3.4 Overseas and Visiting Friends and Relatives (VFR)

Overseas markets inevitably remain the hardest to penetrate, the most difficult to monitor and the most expensive to achieve impact.

Leicester currently sits within the top 20 UK destinations in the International Passenger Survey for overseas, overnight visitors. This is largely due to the buoyant VFR market. However, this type of overseas tourism has so far been largely unaffected by the promotional activities of the destination.

Although at present there is little precise data available about the make-up of this sector of Leicester's visitor market, recent surveys suggest that some 20% of all visitors to the city are here while visiting friends or relations, and almost 60% of 'overnighters' are also VFRs.

Further research into this market is now essential, in order that informed decisions can be made regarding future marketing and promotions for the city.

CHALLENGES

7	**Ensure greater cohesion within the operation and promotion of the local tourism product.**
8	**Explore and prioritise all possible market segments and ensure resources and activities are directed according to agreed priority audiences.**

11. SUMMARY OF CHALLENGES

The challenges draw attention to key areas that need investigation but are flexible in order to accommodate the results of the further development work that will take place.

1	Develop mechanisms for measuring external perceptions of the City in relation to identified competitors and providing business intelligence to shape and advise future initiatives.
2	Examine the image of the City and mobilise all sectors in support of an agreed representation of the Leicester 'brand.'
3	Review levels of Visitor Satisfaction with all aspects of the visitor product and agree strategies to address identified weaknesses.
4	Examine access to the city and its facilities in the broadest sense and agree strategies for sustainable improvement.
5	Explore the role of festivals and the part they play in enhancing the visitor experience.
6	Maximise the impact of existing and new regeneration and development opportunities on the City's tourism potential.
7	Ensure greater cohesion within the operation and promotion of the local tourism product.
8	Explore and prioritise all possible market segments and ensure resources and activities are directed according to agreed priority audiences.