

Marlborough Tourism Strategy The Great Way Ahead

2019 - 2021

V.1

Contents

1. Introduction
2. Vision, Objectives, Priorities
3. Context
 - a. The Visitor Economy and Market
 - b. The Tourism Product Policy
 - c. Destination Management, Organisation and Marketing
 - d. Future challenges and Trends
4. Strategic Analysis: S.W.O.T.
5. Next steps

Appendix A: Action Plan

- Priority 1: Knowledge and Understanding
- Priority 2: Branding and Identity
- Priority 3: Marketing and information
- Priority 4: Improving coordination
- Priority 5: Developing the product and the visitor offer

Appendix B: Data Collection

1. Introduction

Why develop a Tourism strategy? Simply put, because tourism matters. Nationally, it is worth in the region of £97 billion to the UK economy. It also supports jobs and, in the case of rural areas and market towns like Marlborough, it makes a significant contribution to the retention of services, the viability of businesses and the conservation of tradition and heritage, as well as keeping communities vibrant and enticing places to live and work.

If we are to understand what follows in this document, it is key that we go back to basics in our approach and that we consider Marlborough as much more than just a collection of businesses and experiences. Instead we must start to view it as a destination: conveniently located as it is, close to the M4 and yet plum in the heart of stunning countryside. It is widely renowned for its vibrant community and historic significance and stands as a leading heritage town in the south-west of England.

The following is intended to be a useful, working tool that brings the tourism aims of Marlborough together, in one document, providing a single point of reference. It is designed to provide a guiding framework that both the Town Council and the stakeholders of Marlborough, can draw on to develop and manage its visitor and tourism activities. It is hoped it will also stimulate better understanding of and between both domestic and international destination management organisations. The ultimate aim is to be able to deliver a context, vision and principal plan for tourism in Marlborough, thus identifying exactly what needs to be done in the short and medium term to ensure that Marlborough punches above its weight in an already crowded tourism marketplace.

This Destination Management Plan (DMP) has been developed by Marlborough Town Council with an emphasis throughout on developing a successful visitor experience which, in turn, will encourage more visitors, thereby boosting the local economy and ensuring the viability of businesses in the town. It goes without saying that the Council (with its tourism budget of £5,000 for the period 2019-2021) has an ambition to create a prosperous and viable economic future for the town, as well as a vision to create a town where people want to live, work, play and visit. The Town Council has already taken the responsibility for a new Tourist Information Outpost to support this ambition – next step: to produce a comprehensive strategy and help Marlborough stand out for the unique and special town it is.

2. Vision and Objectives

Vision

To make Marlborough the most visited market town on The Great West Way

Objectives

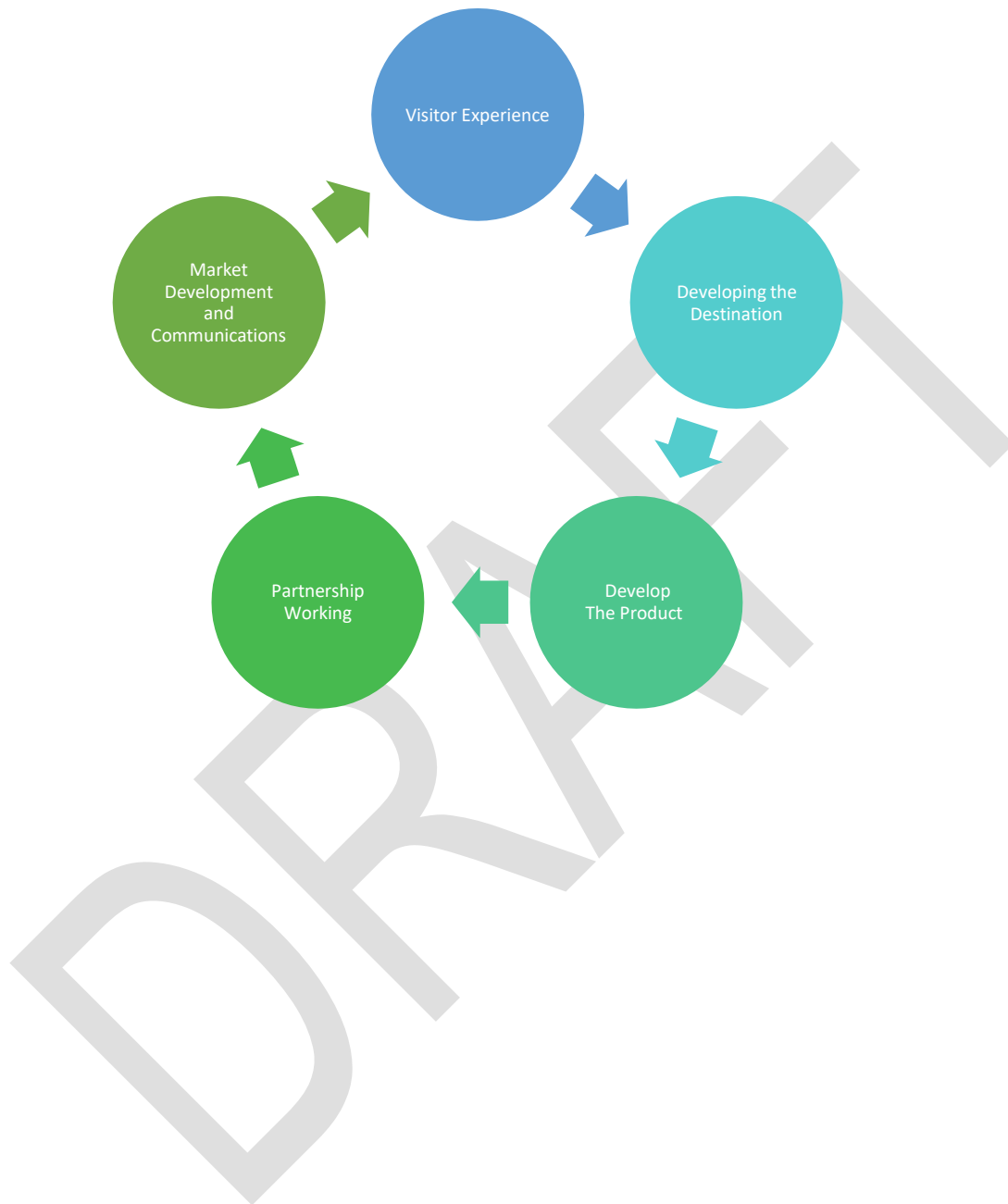
- 1) To increase the number of visitors
- 2) To improve the visitor experience
- 3) To boost the local economy

Priorities

- 1) Visitor Experience – to ensure that the visitor gets the best possible experience from visiting the town, including great customer service and the ability to navigate the town easily and safely.
- 2) Developing the Destination – through improving the physical and natural environment, Marlborough will be an attractive destination to live, work visit and play that will support the economy in the town and the overall community at large.
- 3) Product Development – to build on the assets of history and heritage and to strengthen and grow unknown or newly established products so that the town can benefit from extended seasons and create new and compelling experiences for its visitors. Increasing the number of visitors should not just focus on short stay/low spend/mid-summer visitors, but also take account of the out of season visitor and the low season experience.
- 4) Partnership Working – to work with stakeholders to deliver the elements of the destination management plan.
- 5) Market Development and Communications – identify new and emerging markets eg the “curious traveller” (tailormade for the Great West Way experience) that are suited to the offer in Marlborough and then to successfully communicate with them. Further, to make the best of our memberships to Destination Management Organisations, specifically Visit Wiltshire and Great West Way.

DRAFT

These priorities work on the principle of continuous improvement, in the cycle outlined below:



3. Context

The Visitor Economy and Market

The data below is taken from the South West Research Company's report into the Economic Impact of Wiltshire's Visitor Economy 2018

	2011	2012	2013	2014	2015	2016	2017	2018
Staying Trips	1.5m	1.7m	1.7m	1.8m	1.84m	1.91m	1.94m	1.89m
Staying Spend	£269m	£321m	£339m	£355m	£368m	£378m	£396m	£398m
Day Visits	17.9m	18m	18m	18.1m	17.7m	18.8m	18m	17.7m
Day Visitor Spend	£549m	£638m	£641m	£646m	£668m	£701m	£678m	£646m
Visitor Spend	£819m	£959m	£980m	£1.0bn	£1.04bn	£1.08bn	£1.1bn	£1.04bn
Tourism Turnover	£1.1bn	£1.2bn	£1.4bn	£1.4bn	£1.5bn	£1.55bn	£1.56bn	£1.5bn
Number of jobs	20,917	27,583	28,032	28,062	29,100	29,000	29,159	28,000
Estimate GVA	£638m	£799m	£817m	£826m	£860m	£875m	£877m	£842m

A summary of the headline results from the above-mentioned report are as follows:

- Wiltshire attracted approximately 19.6 m day and staying trips with a total direct visitor spend value of £1.04 bn, a 3% decrease from the record year of 2017. This generated £1,499 of business turnover in the county supporting an estimated 28,000 tourism related jobs (8% of all employment overall, the same as in 2017).
- The decrease in visitor spend is largely as a result of the Salisbury attacks and a drop in urban day visits and spend, although there was also a decrease in urban day visit spend generally which is supported by many media reports of reduced spending in the UK high streets during 2018. This has subsequently meant small percentage decreases in related turnover and GVA.
- Wiltshire received approximately 1.9 m staying trips accounting for 6.2m visitor nights and £398 visitor spend with domestic visitors accounting for the large majority of staying trips (83%). All staying visitor trips decreased by 3% and nights by 1% compared to 2017 with spend remaining at a similar level. This is the first decrease in staying visitor trip volumes since 2013 with year on year growth between then and 2017.
- The proportion of regional staying spend occurring in Wiltshire has grown from 5.42% in 2011 to 6.69% in 2018 and whilst this has dipped slightly from 2017 (6.77%) it has shown year on year growth in previous recent years (6.61 in 2016 and 6.46% in 2015.) Whilst the percentage change is not large this still represents progress with 1% of all regional staying spend equating to

approximately £59.5 million in 2018.

- Holiday (68%), business and visiting friends and relatives (14% each) were the main purpose of the majority of trips to the county. Holiday and business trips decreased by 2% compared to 2017 and visiting friends and relatives trips increased by 1%. Whilst the proportion of holiday trips has decreased slightly in 2018 it is still 11% higher than in 2014 when holiday visits only accounted for 57% of trips.
- Seasonally data suggests that June, July, August and December were the top months in terms of volumes of staying trips to Wiltshire. Trip volumes in the fourth quarter (Oct to Dec) have grown considerably from the base year of 2013 (+13%).
- Wiltshire received approximately 17.7m day visits generating £646 in day visitor expenditure. Day visit volume in 2018 was 2% lower than in 2017 and spend decreased by 5%. At a national level day visitor volumes decreased by 5%. In terms of seasonality day visits and spend were well spread across the year.
- Of the approximate £1.04bn direct visitor expenditure in the county 13% was spent in the accommodation sector, 25% on shopping, 35% on food and drink, 13% on attractions and entertainment and 14% on travel and transport within Wiltshire.
- Average spend per person per visit remains at very similar levels to previous years:
 - i. UK staying visitors stay on average 2.7 nights, spending £178 per person, per visit.
 - ii. Overseas staying visitors stay on average 6.1 nights, spending £375 p/p per visit.
 - iii. Day visitors spend an average of £36 per person, per visit.

The product: Understanding Marlborough

What is Marlborough?

- 1) A quintessential English Market Town - Unspoilt with picturesque old buildings, a fine College, good pubs, quirky shops, bi-weekly market
- 2) A historical magnet – The gateway to Avebury and a wider Wiltshire heritage
- 3) A vibrant community – Welcoming people, cosmopolitan and bespoke shopping, lively food and drinks options and a bouyant arts scene with plenty of year-round festivals
- 4) A rural setting – Stunning countryside, canal, cycling, walking, North Wessex Downs, AONB, Savernake Forest

These are the key features that we want Marlborough to be known for and for visitors to experience and use. These assets give Marlborough its identity and make it a leading destination. By promoting these key features, we can best promote and manage it as a destination.

Core Strengths

- 1) Clean and tidy
- 2) Excellent range of shopping/retail with a clear emphasis on high end independents with browsing options of visitor interest
- 3) Most visitor requirements within reasonable walking distance
- 4) Mobile coverage and free wi-fi
- 5) Car parking
- 6) Updated loos
- 7) New Tourist Information Outpost to open in Spring 2020
- 8) New hotel investment: Premier Inn to provide accommodation for up to 150 guests with likelihood of more accommodation in the future

Core Weaknesses

- 1) Signage inconsistent or absent and does not necessarily assist the first-time visitor
- 2) General lack of information and interpretation, including current phantom TIC. Poor visitor leaflets and lack of clarity over the “official” tourism point
- 3) Not enough parking
- 4) Traffic congestion
- 5) Lack of Coach Friendly Status
- 6) Lack of group “bookable attractions”
- 7) Inconsistent or non-existent branding – no consistent online brand or identity or message for visitors
- 8) Publications and downloadable visitor info not available
- 9) Poor social media activity
- 10) Lack of family facilities/attractions
- 11) Visitor infrastructure weakened by current limited range of accommodation

These weaknesses are useful in highlighting areas for potential action. However, some may also be issues or practicalities that cannot be solved easily and need to be taken into account with the way we develop the offer and the things we say to visitors. No

weakness should be a barrier to action.

What do we want to achieve?

The next step is to look at what Marlborough Town is trying to achieve. Tourism needs to balance the Town needs with the needs of the market or audience.

Key priorities

- 1) Branding and identity – to exploit Marlborough's assets and present the visitor offering in a consistent way so that people might stay longer, spend more and want to return
- 2) Communicating information – to improve marketing and access to information for visitors both prior to a visit and post arrival
- 3) Improving coordination – to coordinate tourism in Marlborough effectively so that all stakeholders work together as a destination
- 4) Developing the product – to improve the range and quality of the visitor offer
- 5) Knowledge and understanding – to improve understanding of Marlborough's visitors, what we have to offer them and how well we are performing

These priorities will now to a large extent direct the actions we aim to achieve.

Who do we want to attract?

Who do we perceive to be our prime audiences? Who are the people Marlborough already attracts? Who could Marlborough appeal to and who will deliver the kind of behaviour to help us meet our priorities?

Key visitor audiences

- 1) M4 corridor weekenders by playing on our strengths (specialist shopping, history, heritage and events)
- 2) Outdoor enthusiasts – this spans a wide age group and includes an increasing number of active retired (walkers, bikers, hikers)
- 3) Local day visitors
- 4) College parents and young families
- 5) International visitors

These audiences represent our assumptions and thinking about who might be interested and who would be the kind of visitors we want. They should be viewed as a starting point

and further research should be undertaken before solely pursuing these audiences.

Who is our competition?

Now that we have a fair picture of Marlborough, to complete the critical look at the destination we need to identify some of the other destinations which function as Marlborough's competition.

Competitor analysis allows us to:

- 1) Learn what else is potentially attracting audiences and visitors
- 2) Evaluate our offer and see how we measure up against them
- 3) Review and evaluate the experience and strategies others use to attract and retain those audiences
- 4) Identify potential partners for joined up action

In the case of Marlborough, we are looking for destinations with the following characteristics

- 1) Attractive town centre with strong visitor shopping offer
- 2) A historical centre and gateway to other heritage attractions
- 3) A vibrant arts scene and calendar of events
- 4) Countryside setting which attracts outdoor enthusiasts

Based upon these characteristics, potential competitors that could be useful to analyse the Marlborough offer against could include:

- Devizes
- Hungerford
- Bradford on Avon
- Corsham
- Malmesbury
- Calne

Policy

There is a hierarchy of policies, plans, organisations and objectives that impact on the tourism industry. These national and regional policies will impact on the context within the development of Marlborough as a tourist destination. These policies highlight and include:

- Government recognition that support is needed to see a growth in tourism in rural areas
- Visit Britain/Visit England focusing on building England's tourism product. i.e. funding for projects like The Great West Way for which Marlborough is a Destination Ambassador.
- The objectives of VisitWiltshire are to promote and market the county of Wiltshire as a tourist destination and to act as an official voice for those involved in Wiltshire tourism industry.

In order to achieve this vision with regards to tourism, the council have vowed to encourage and promote the economic and commercial vitality of the town and provide and support town events to encourage visitors from further afield.

Destination Management, Organisations and Marketing

To ensure that the Strategy and Destination Management Plan is taken forward and Marlborough is able to grow and prosper it is essential that partnerships are strengthened or established between tourism organisations and town stakeholders, to ensure a collaborative approach for tourism in the town.

VisitWiltshire

VisitWiltshire is the main Destination Management Organisation for the County of Wiltshire and offers out of county marketing and PR opportunities to increase visitor numbers. It has an extensive network of Travel Trade contacts (group travel, coaches, executive travel). Marlborough is a 'town member' partner of VisitWiltshire.

Great West Way

VisitWiltshire in consultation with other destination management organisations has created a new touring route 'Great West Way'. The aim for the route is for it become as iconic as the 'Route 66' in the USA and 'The Wild Atlantic Way' in Ireland. Great West Way is a 125-mile route which runs from London to Bristol and takes in many of England's iconic destinations and attractions. The Route has gained support from Visit Britain and has secured a grant of £1 million from the 'Discover England Fund'. Marlborough is a Destination Ambassador for Great West Way.

Future Challenges and Trends

The Visit Britain/Visit England's future trends report from 2015 showed that over the next 5 - 10 years there will many new challenges and trends. These include:

- The Ageless Traveller - people are living longer and more active lives, while adhering less and less to a traditional order of key life stages, it is becoming less relevant to think about travellers in terms of their age and more in terms of their interests.
- The Curious Traveller who is seeking the real authentic England and a key component of the Great West Way initiative
- Targeting audiences on social media and online will become more difficult and time consuming with the filter bubble and personalised algorithms.
- Travellers will look for destinations where they can collect many unique experiences without having to invest considerable time and money. They will also want to find out as much as they possibly can about a destination before they get there. Online information is key.
- Booking may change with future travellers being able to expect to purchase directly from Wishlists on interfaces such as smart TVs. Being able to book through messaging apps and the desire to travel like a local not a tourist and the growing use of mobile devices and booking on the move rather than before the trip starts
- Connected Travel - Location based apps that allow a visitor to move through a location without Wi-Fi helping to navigate using phones and tablets. Visitors are more social media savvy and require a destination that is “instagramable” and easy to share.
- Well-being and Relaxation – Due to the pressures of modern-day life a key motivation for travel in the future is to focus on mental wellbeing and escapism of everyday stress. This can also include a digital “detox”.
- Pursuit of Real – Future travellers will seek to get rid of the tourist stamp and experience like a local, as well as seeking to improve their skills or learning a new skill (i.e. cookery classes).

4. Strategic Analysis

A Strengths, Weaknesses, Opportunities and Threats (S.W.O.T.) analysis has been undertaken to identify the areas that need to be addressed and developed, these then have informed the priorities and outcomes needed to deliver the Vision of this strategy.

Strengths	Weaknesses	Opportunities	Threats
------------------	-------------------	----------------------	----------------

DRAFT

<ul style="list-style-type: none"> • Gateway to heritage sites • Historic buildings and Blue Plaque walk • Varied food and drink • Large number of independent business • New Tourist Information Outlet with leaflet racking, map and Wi-Fi to open in Spring • Array of interesting open green spaces • Strong arts and culture scene with a year-round calendar of events • Tower tour at St Peter's church, The Merchants House • Proximity to M4 corridor/ position on A4 at centre of Great West Way route • Rural setting – on edge of AONB with good walks, cycling, bike hire • Destination Ambassador on the Great West Way. • Partnership relations with Destination Management Organisations • New, improved loos • New Premier Inn 	<ul style="list-style-type: none"> • Lack of railway station • Car parking limited • Traffic problems • Lack of canal boat access compared to other towns on Great West Way • Limited range of places to stay in town • Directional signage not matching and/or in useful places • No consistent iconography or branding • No Marketing Plan • Tourist Information Centre currently difficult to locate • Brexit uncertainty • Tourist Information dated and not fit for purpose • Lack of printed material available online or hardcopy that can be sent out to prospective visitors (Visitor's Guide) • Lack of official visitor website • Need to encourage stakeholders to take more of an active role • Lack of family appeal 	<ul style="list-style-type: none"> • Gain Coach Friendly status to increase awareness of the town to coaches • Maximise visitors' interest in the local food/drink and the outdoors • Identify, develop and articulate a brand • Investigate possibility of Hungerford park & ride • Improve car park offer to increase day trips and shoppers • Utilise marketing opportunities offered by the DMOs and the Great West Way to engage both national and international audiences • Gather local business and accommodation data on visitor trends • Create a visitor's guide and a better map with smartphone apps • Create a town trail • Improve signage • Work on creating online "bookable" products • Improve social media • Promotional video 	<ul style="list-style-type: none"> • Ageing visitor profile • Low rate of overseas visitors • Accommodation is expensive and no budget option – to be remedied • Limited accessible accommodation • Many organisations not working together, no one place to find information. • Traffic problems increasing through the town with increased visitors. • Limited crossings and small pavements • Limited data gathered from Visitors businesses and accommodation providers • Uneven pavements and cobbles tricky for Shopmobility customers on electric scooters
---	---	---	--

5. Next Steps

The Action Plan, attached as an appendix, will provide the foundation for the Town Council to direct its efforts.

The implementation of the action plan will be regularly over seen by the Town Council with the intention to follow the methodology of 'Plan – Do – Review' to monitor progress, with a formal review of the Strategy and Destination Management Plan after two years (2021).

Due to the current lack of reliable data The Council plans to collect data to create a baseline to measure the outcomes from the strategy against.

DRAFT

Appendix A: Action Plan

Priority 1: Knowledge and Understanding

	Who	When	£'s
Compile a full product audit of Marlborough's assets			
Conduct seasonal visitor surveys to improve understanding of visitor types, needs and behaviour			
Undertake business surveys to benchmark performance and measure success			

Priority 2: Branding and Identity

	Who	When	£'s
Workshop, possibly with stakeholders, to develop a consistent Marlborough brand and pool resources to maintain a strong digital presence			
Develop a visual style and identity			
Provide simple guidelines to all stakeholders to encourage use of the brand to send out the same message			

Priority 3: Marketing and information

	Who	When	£'s
Agree a marketing plan with stakeholders to define priorities for promotional activity			
Develop a single visitor-facing, user-friendly website for Visit Marlborough			
Improve visitor navigational experience – wayfaring, map boards and general signage			
Update leaflets and consider creating thematic Explore Marlborough guides (food and drink, accommodation, where to take kids, dog friendly places, local walks)			
Consider running/hosting Great West Way workshop for local stakeholders			

Priority 4: Improving coordination

	Who	When	£'s
Set up a quarterly Tourism Working Party to include key stakeholders			
Develop an email group or Whats App Group to build communication between all interested parties			
Develop a twice- yearly forum for stakeholders to network and interact face to face			
Develop relationships with Visit Wiltshire and Great West Way and maximise on promotional opportunities			
Identify and foster new partner relationships that benefit tourism in Marlborough			

Priority 5: Developing the product and visitor offer

	Who	When	£'s
Develop and support Coach Friendly Status, work on Meet & Greet			
Work on parking and traffic strategy for the town			
Develop themed packages to link attractions and enhance visitor experiences			
Improve online appeal			
Equip and set up the new Tourism Information Outlet			
Audit existing signs from main points of entry and define priority sites for signage/interpretation panels to improve visitor orientation			
Investigate feasibility of Blue Plaque town trail and possible others by local guides			
Develop a wider travel trade marketing plan to include heightened presence at key trade events			

Appendix B: Data Collection

Marlborough currently has no reliable information regarding visitor numbers and their activities. Thus, a data collection exercise is planned to take place as soon as we have the resources available in order that the Town Council has a better understanding of how many visitors come to the town and what their priorities are. This will enable the Council to determine its targets for increasing visitor numbers and enhancing their experience. Questions will include:

- How many people visited the town?
- Where did they come from?
- How long did they stay?
- How did they travel to the town?
- How much did they spend?
- How did they hear about us?
- What did they like? Accommodation, Food and Drink, Sightseeing?
- What could be improved?