

# North Somerset

## Visitor Economy Action Plan



**North Somerset**

[www.innorthsomerset.co.uk](http://www.innorthsomerset.co.uk)



# Contents

Introduction	3
Strategic objectives and priorities	6
Visitor economy overview	7
Action Plan	11
Governance	17

# Introduction

The aim of the Visitor Economy Action Plan is to increase visitor spending and support the retention of this income within the economy, to benefit local employment, businesses and communities.

Prior to Covid-19 tourism was one of the UK's largest and fastest growing industries, generating £106 billion Gross Domestic Product (GDP) a year. It employed over 2 million people, supported thousands of businesses and worked hand in hand with a wide range of sectors across England, including creative industries, food and drink, retail, sport, museums and the arts. In North Somerset the indirect contribution of the visitor economy was worth nearly £378 million and it supported around 7,300 jobs (The South West Research Company 2018).

The Covid-19 crisis is having a devastating effect across the country and a variety of sectors. The Council has adopted a new Economic Plan which sets out the high-level priority actions it will take to support our local economy and residents. Because the impact on the visitor economy is so severe one of these actions is to develop a targeted Visitor Economy Action Plan.

This Action Plan sets out visitor economy context in the area, identifies key challenges and priorities, and outlines a set of actions designed to address these. The action plan should be read with the following principles in mind:

- North Somerset Council cannot deliver this plan alone, it will rely on and need to nurture relationships with a range of partners.
- The Action Plan has been developed at pace to respond to the crisis in the sector and we would welcome input from partners to help us strengthen it and deliver the activities.

Producing an action plan during the Covid-19 pandemic requires a flexible approach. The overall objectives and ambitions will underpin all our visitor economy activity for the coming years, but our response to the economic and social impacts of Covid-19 on the sector will require new actions and a flexible approach, as the impacts of the pandemic unfold and change over the coming months. Responding to the changing needs of businesses and people as we move through the crisis and into medium and long-term recovery will require this Plan to be kept under review.

The Visitor Economy Action Plan is firmly within the wider context of the Council and its partners' approach to economic recovery, including its new Economic Plan. It is the Council's response to coalescing support around an industry, places and people which have been significantly impacted by the economic shock caused by Covid-19. The Visitor Economy Action Plan is also informed by and complements other local strategies, to ensure that efforts and resources can be coordinated as far as possible, and the outcomes achieved support the wider objectives of the Council and key partners:



Strategy or Priority	Why is it relevant?
NCS Corporate Plan	<p>The Corporate Plan states an overall commitment to an 'Open, Fairer and Greener North Somerset': The Visitor Economy Action Plan contributes to all these objectives, specifically:</p> <ul style="list-style-type: none"> <li>● A place for people to live, work and visit</li> <li>● An attractive and vibrant place for business investment and sustainable growth</li> <li>● A focus on tackling inequalities and improving outcomes</li> </ul>
Economic Plan	<p>Given the impact on the sector caused by Covid-19 the visitor economy has been identified as an area of focus for economic renewal. It will respond to the foundations of the plan in the following ways:</p> <ul style="list-style-type: none"> <li>● Green – Focus on environmentally friendly tourism, promotion of local products and visibility of our green assets and attractions.</li> <li>● Digital – Support businesses to adopt digital solutions to increase their resilience, productivity and growth.</li> <li>● People – Work alongside the Employment and Skills Strategy to improve the quality of jobs offered in the visitor economy and ensure people have the skills needed to access them and progress.</li> </ul>
Employment and Skills Strategy	<p>The Employment and Skills Strategy and Visitor Economy Action Plan will work together to focus on:</p> <ul style="list-style-type: none"> <li>● Developing the skills needed to support the sector in both its survival and growth</li> <li>● Create the environment which will enable businesses to provide better quality jobs which are less precarious and pay higher salaries.</li> <li>● Deploy redundancy support to businesses and residents in the visitor economy facing job losses.</li> </ul>
Weston Placemaking Strategy	<p>The visitor economy is a critical part of Weston's economy and its success will be a core component in the success of the placemaking work</p>





Strategy or Priority	Why is it relevant?
Cultural Strategy	<p>Culture and creative industries are a critical part of the visitor economy. The Visitor Economy Action Plan will contribute to the following objectives of the Cultural Strategy:</p> <ul style="list-style-type: none"> <li>● Support placemaking (as above)</li> <li>● Promote participation and quality – increased footfall from visitors will increase levels of participation</li> <li>● Grow and retain talent – an improved visitor economy will make North Somerset a place for people to invest and live</li> <li>● Raise our profile – through increasing the visibility of our visitor economy and promotional activity</li> <li>● Build capacity – direct investment in the sector supports our visitor economy.</li> </ul>
Climate Emergency	<p>This Action Plan will support the creation of green and sustainable businesses and jobs, and work alongside the Employment and Skills Strategy to ensure people gain the skills to enter jobs created through the growth of environmentally friendly tourism.</p>
Local Plan	<p>The Local Plan has a strong focus on employment growth and job creation through development: this Action Plan will support people to access these opportunities, encourage diversity in our town centres and local places through the development of new attractions and consider the best locations for new visitor developments.</p>



## Strategic objectives and priorities

**Overall objective: To increase visitor spending and support the retention of this income within the economy, to benefit local employment, businesses and communities.**

**To pursue this, we have identified three priorities for action:**

- 1. Increase visibility** of North Somerset as a destination and what it has to offer.
- 2. Increase the value** of the visitor economy sector and sub-sectors in North Somerset.
- 3. Increase the diversity** of the current offer to better match visitor trends.





# Visitor economy overview

North Somerset is strategically located at the gateway to the South West and part of the highly successful West of England region. Four main towns, Weston-super-Mare, Nailsea, Clevedon and Portishead and 25 miles of coastline and countryside are well connected nationally and internationally with an airport, port, and direct trains to Paddington, South Wales and Midlands.



The region's opportunities for business investment and innovation, together with natural assets, culture and heritage scene makes it a place where people want to live; work and visit.

## Visitor economy in numbers

- Worth £373,722,000 (broken down £366,667,000 direct visitor spend £7,055,000 other related spend)
- Supports 7,300 jobs
- Accommodation, food and service activities, arts and recreation and retail combined only made up 15.3% of North Somerset's GVA<sup>1</sup>
- Average salaries in industries associated with the visitor economy in the South West are lower than average e.g. accommodation, food and service is £15,300 and arts and recreation is £17,900, compared to an average salary of £26,700 across all industries<sup>2</sup>
- 528,000 staying visitor trips and 1.8million staying nights
- £105,513,000 staying visitor spend
- 7,467,000-day visits
- £261,154,000 day visitor spend
- 7% proportion of all employment

All data unless otherwise stated is from The South West Research Company Ltd's 2018 report for North Somerset

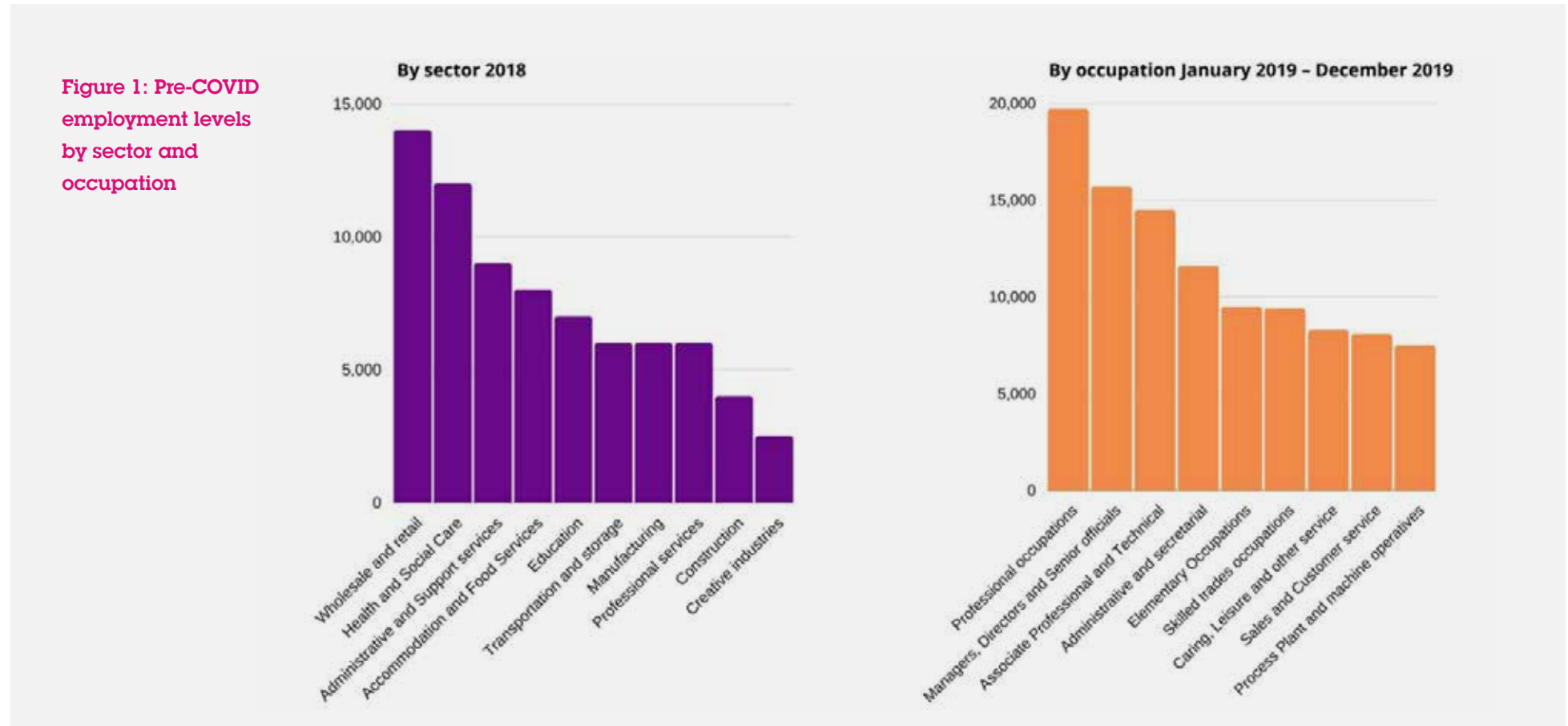
<sup>1</sup> ONS data

<sup>2</sup> WECA weekly Covid-19 update

## Covid-19 impact

Visit Britain have suggested that it will take until 2024 for inbound tourism to recover to pre-COVID levels. Visitor economy businesses are already making the difficult decision to make redundancies, and more are anticipated. This is particularly challenging for North Somerset where the visitor economy is a volume sector in terms of employment numbers.

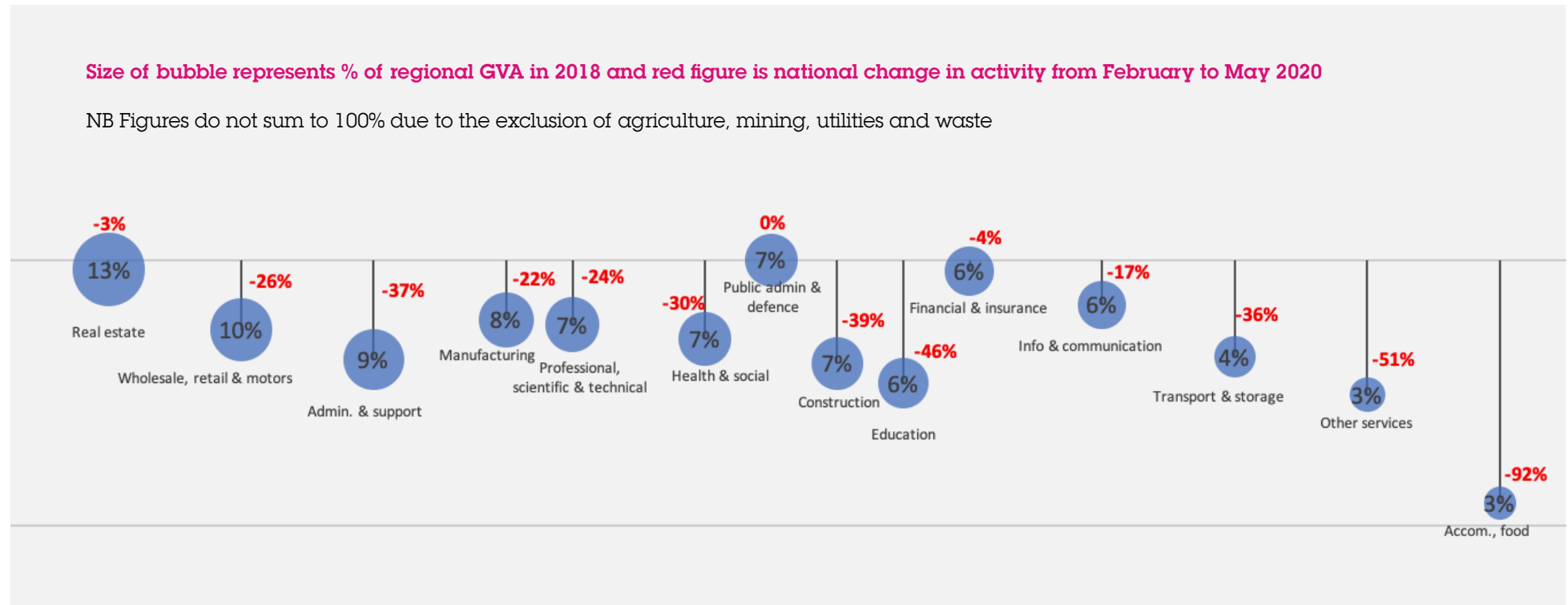
Figure 1 demonstrates how sectors (retail, accommodation and food services, administrative services and creative industries) and occupations (leisure, sales and customer service) traditionally found in the visitor economy are some of the biggest employing areas in North Somerset.





Strikingly, leisure and tourism businesses are those with the highest furlough levels across the country (80% of staff furloughed compared to the 30% national average<sup>3</sup>). If these furlough figures translate into redundancies this will be a significant and structural employment crisis North Somerset will have to respond to. A survey with North Somerset visitor economy businesses suggested 75% would need to make some redundancies.

The chart below shows the recent impact on Gross Value Added of key sectors of the economy, at a national level. Whilst almost all sectors have experienced a drop in economic output, some are clearly more negatively impacted than others, with the largest negative growth evident in accommodation and food services displaying a 92% drop. In addition the South West is predicted to lose 28% of its creative jobs (43,000 jobs)<sup>4</sup>.



<sup>3</sup>North Somerset Council Employment and Skills Strategy

<sup>4</sup>Oxford Economics report, commissioned by Creative Industries Federation: Our World Without Culture, June 2020

While being mindful of the significant difficulty many businesses and residents working in this sector will face due to the impact of Covid-19, this action plan identifies an opportunity to rebuild a stronger, more sustainable industry. The high number of jobs pre-Covid do not necessarily mean high levels of GVA, good quality jobs or a resilient sector. The pre-Covid-19 data above demonstrates:

- That accommodation, food and service activities, arts and recreation and retail combined only make up 15.3% of North Somerset's GVA pre COVID , suggesting the sector is more visible than valuable.
- The sector does not provide well paid jobs with salaries being on average below other industries in the South West. In addition. ONS data shows that industries typically found in the visitor economy have a higher than average proportion of zero hours and precarious employment. 22% of people working in accommodation and food industries, 16% of transport, arts and 'other' industries and 11.3% of people working in retail are on a zero hours contract. This compares to a cross industry average of 10%.
- Research following the last economic crash showed that the sector is susceptible to even small economic threats including recession, currency fluctuations, taxation, rising costs and falling revenues. The impact of Brexit on the sector was a cause for concern, both in terms of being able to recruit staff (ONS estimates that of the 3.3 million workers in the UK tourism industry, overseas workers account for around 16%) and in terms of the potential reduction of consumer demand. This suggests there was a fragility to the sector even before the Covid-19 crisis.

This pre-Covid picture can be set alongside significant changes being caused by the pandemic which is leading to the creation of new value especially pertinent in the visitor economy. The heightened salience of our digital and local lives compared with the contraction of our global and physical experience means that while financial value and productivity will no doubt remain core drivers in economic recovery the importance of feeling safe, improved wellbeing, certainty in supply, importance of our local communities and the quality of the green environment have all increased in prominence as drivers behind people's decision making. A renewed and reconsidered visitor economy in North Somerset, with these new values in mind, has the potential for growth and to deliver on many of our priorities.

**The opportunity to reshape and revitalise our visitor economy is therefore responding to three core drivers:**

1. A sector which pre-COVID did not generate significant levels of GVA or value for those working in it
2. Significant challenges caused by COVID-19 leading to business closures and redundancies
3. New value generated leading to changes in demand from the visitor market.

North Somerset Council will play a key leadership role in capitalising on our local visitor economy's growth potential through creating the conditions for it to thrive, responding to the huge challenges it faces by working with the opportunities borne out of the pandemic. The Action Plan identifies projects and interventions NSC feel would support the sector.

# Action Plan

## 1. Increase the visibility of North Somerset as a destination and what it has to offer

### Why we want to do it

- Our businesses report that they do not feel our attractions and assets are visible enough on regional, national and international platforms.
- The increase in 'staycations' and reduction in ability to travel internationally means we need to make the domestic market aware of our existing offer, e.g. research from booking providers show that domestic customers are already booking way into 2021 and there has been an extension to the normal season .
- Several of our visitor attractions and assets already respond to the new value created by Covid-19 (e.g. excellent access to green attractions and infrastructure and high value local produce) we just need to make people aware
- More visitors to existing attractions will mean greater business resilience and more jobs safeguarded
- North Somerset retains its reputation as a film friendly location and increased numbers of visitors are attracted by the film tourism offer

### What is happening already

- We are gathering and maintaining a bank of high-quality images to promote our existing offer which when used consistently by businesses and partners can strengthen and reinforce North Somerset's destination messages.
- We have explored ways of promoting this new material, for example Visit North Somerset Instagram account.
- We have launched North Somerset Film Office to maximise the promotional opportunities created by filming and film tourism.
- We have set in motion the compulsory purchase of Birnbeck Pier by partnering with RNLI.





## What's next

Action	Outputs	Timescale	Outcomes
<b>Build partnerships with our Destination Management Organisations to utilise their expertise in promoting North Somerset as a destination, exploring the possibility of joining one or more to unlock access to potential national funding opportunities and promotional opportunities (priority action)</b>	Formal relationship with at least one DMO.	Dec 2020	<b>Annual increase in the GVA contribution of the industries which make up North Somerset's Visitor Economy<sup>7</sup>. Baseline contribution = 15.3%</b>
	DMO led digital marketing plan developed	Dec 2020	
	National media press coverage	March 2021	
<b>Support content generation projects (selfie spots, tours, trails etc.) that allows visitors to create their own content and promote on social media (priority action)</b>	Two new trails, tours or selfie spots developed	March 2021	<b>North Somerset visitor economy businesses report improved visibility at the local, regional and national level</b>
<b>Encourage and support our partners to create itineraries designed to deliver what visitors are looking for and which make it easy for them to book online - itineraries that combine attractions, places to eat, places to shop and places to stay (priority action)</b>	Four long weekend itineraries created and promoted. Focus on: <ul style="list-style-type: none"> <li>● Culture and heritage</li> <li>● Active holidays</li> <li>● Foodie breaks</li> <li>● Environmentally friendly breaks</li> </ul>	Summer 2021	
<b>Explore partnership opportunities to sponsor signage in key locations</b>	Signage on strategic locations e.g. M5		<b>Increase in the value of visitor staying trips</b> Baseline = £105.5 million <sup>8</sup>
<b>Partner with Bristol Airport to raise the area's profile to international visitors in collaboration with regional and national partners.</b>	Three North Somerset events and cultural attractions promoted through in-terminal and digital communications		<b>Safeguarding jobs</b> Baseline = 7,300 supported by the sector
	Jointly identify and work towards funding opportunities e.g. at the regional level through Tourism Action Zones		
	A staffed tourist information point in the arrivals area of the terminal and tourist information training with staff that interact with incoming passengers e.g. taxi drivers, to sell North Somerset as a destination	By March 2022	

<sup>7</sup> Accommodation, food and service activities, arts and recreation and retail

<sup>8</sup> Given the impact of Covid-19 on the sector success in 2021/22 should be measured by maintaining the current baseline levels.

## 2. Increase the value of the visitor economy sector and sub-sectors in North Somerset.

### Why we want to do it

- Over the last decade the volume and value of tourism in North Somerset has been growing much more slowly than the national average<sup>9</sup>
- Low value of the sector means that jobs in North Somerset's visitor economy are poorly paid, precarious and seasonal. This impacts on residents' financial resilience, better quality businesses will result in better quality jobs.
- Covid-19 is likely to result in large scale redundancies across the sector
- Growth should be about value not volume to ensure a sustainable sector which retains income in the local economy.
- Increase in quality standards will support our businesses in becoming more resilient by attracting new visitors, extending their season and increasing income.

### What is already happening

- Negotiating a partnership with Visit Somerset to deliver a series of targeted workshops to our visitor economy businesses to increase capacity building, productivity, sustainability, levels of accessibility and inclusive growth.
- Start-up and small business support available for visitor economy businesses via North Somerset and the Growth Hub's investment in a Universal Business Support Programme.
- Launching Weston Place Making Strategy. This document provides a prospectus to refresh the regeneration vision for the town and align the activities that define the experience (i.e. the product) of Weston.
- Launching Weston Place Agency, a structure for greater collaborative place leadership between partners in Weston. This will bring focus and unity to a breadth of passion, assets, resources and content of organisations and interests to better broadcast Weston's product and increase value across the town.

## What's next

Action	Outputs	Timescale	Outcomes
Co-ordinated work with the Employment and Skills Strategy to understand the skills requirements to improve the quality of jobs in the sector and where jobs cannot be saved due to redundancies what reskilling and upskilling needs there are for people effected (priority action)	'Visitor Economy Skills Deep Dive' to understand changing nature of skills in the sector due to Covid-19	Oct 2020	<b>For 2020/ 21 success will be measured by maintaining our Thriving Places Index scores in relation to work and local economy.</b> From 2021 onward we will seek to improve our TPI score in this area. Baseline = 6.21
	Implementation of skills products for: a. Those impacted by redundancy in the sector (Rapid Redundancy Taskforce) b. The business skills needs of the sector which can lead to better quality jobs	Dec 2020	
Focussed support for accommodation providers to improve the quality of their offer to enable them to appeal to visitors with higher levels of disposable income (priority action)	Audit of accommodation stock	Dec 2020	<b>Positive impact on wellbeing – using Pulse surveys to measure impact.</b>
	Survey with accommodation providers to understand target market, growth ambitions & challenges Evidence base to share with accommodation providers describing the benefits of improved quality offer and tips (e.g. cross promotion of other high quality local offers such as Made In North Somerset marketplace) to support them.	March 2021 Summer 2021	
Encourage high-quality accommodation providers to chose North Somerset as a place to expand, invest and set-up (priority action)	Identify potential sites/buildings for boutique hotels, high-quality hotel chain and non-serviced luxury accommodation	Dec 2020	<b>Increase in the overall value of North Somerset's visitor economy.</b> Baseline = £373m
	Support partners to promote sites to developers linking with Weston Place Agency and Invest Bristol and Bath (IBB).	Summer 2021	
	Three enquiries/ year from high-quality accommodation providers	March 2022	
Explore the possibility of hosting a Visitor Economy Summit - an annual event for all major stakeholders to report progress and identify priorities and collaborative activity to deliver the action plan.	Annual Visitor Economy Summit – delivered at minimal cost to the council (i.e. via sponsorship, DMO and visitor input)	From March 2022	<b>Increase in average lowest salary (South West data available only).</b> Baseline = £15,300





### 3. Increase the diversity of the current offer to better match visitor trends.

#### Why we want to do it

- Despite some of our attractions matching the changes in holiday makers demands, not all do, and we are therefore missing out on visitor footfall
- New value created by Covid-19 means people want a different offer from their holiday experience – North Somerset must respond
- Improvements to the North Somerset visitor economy offer to provide greater levels of accessibility, sustainability and inclusivity improves wellbeing and resilience of our businesses by extending their market reach.

#### What is already happening

- Following the adoption of a North Somerset Cultural Strategy the council has directly invested in the North Somerset Cultural Programme to deliver a programme of activity aimed at animating and enlivening our town centres.
- Launched Made in North Somerset Marketplace to showcase local produce
- The restoration and relocation of Banky's icon Pinwheel into Weston town centre.
- Delivered outdoor seating areas in our town centres as a direct response to social distancing impacts on businesses and to encourage visitors.
- £1.1m secured funding from Historic England to create a new heritage programme for Weston town centre.
- Weston General Stores - £1.7m secured to repurpose redundant retail space in Weston town centre to deliver workspace for collective trading platforms entrepreneurs, micro-manufacturing, events and rehearsal, cycle hub, business support, and skills, learning and employability.
- Partnership agreed with Visit Somerset to undertake market segmentation research to inform business development.



## What's next

Action	Outputs	Timescale	Outcomes
<b>Develop and promote an environmentally friendly tourism campaign identifying the environmental benefits of staycationing in North Somerset (priority action)</b>	Consumer focussed fact sheet re: environmental benefits of visiting North Somerset e.g. carbon saved from reduced travel, how to be a responsible tourist and local produce available	Dec 2020	<b>A reduction in North Somerset's annual emissions</b>
	Four themed car free itineraries developed, including exploiting links with the Tidal Trail	March 2021	<b>Increase in the value of visitor staying trips</b>
	Campaign with DMOs to promote environmentally friendly tourism	June 2021	Baseline = £105.5 million <sup>10</sup>
<b>Encourage businesses to adopt the principles of reducing plastic, sourcing food and drink locally and adopting environmentally friendly practices (priority action)</b>	Universal business support offer to start-up businesses which focuses on embedding sustainability at the start of businesses' journey	Sept 2020	<b>Safeguarding jobs 2020/21. Baseline = 7,300</b>
	Webinars for existing visitor economy businesses providing guidance on ways to be more environmentally sustainable	Dec 2020	
	Business focussed fact sheet with case studies and tips on more sustainable practices	March 2021	
<b>Retarget our events strategy to respond to demand and economic challenge (priority action)</b>	Strategic events action plan	March 2021	<b>Increase in job numbers in 2021/22 onwards</b>
<b>Create links between North Somerset town centre transformation and visitor economy to ensure positive outcomes for the sector. Particular focus on cultural offer (priority action)</b>	Include high quality images of town centre culture and heritage offer on Instagram account and other promotional materials	Oct 2020	<b>Increase in the overall value of North Somerset's visitor economy. Baseline = £373m</b>
	Deliver visitor offer in Weston General Stores	Mar 2022	
	Four itineraries focussed around culture and heritage	March 2021	
	Secure funding from WoE recovery focussed on community and culture	March 2021	
<b>Work with the Communications department to get editorial pieces into key magazines, papers and online digital content (film)</b>	2 editorial pieces in targeted media	Dec 2021	<b>Increase in average lowest salary (South West data available only). Baseline = £15,300</b>
	Creation of high quality film	Summer 2021	



## Governance

**The Action Plan will be monitored by the Head of Economy and progress will be reported to the Executive Member for Business, Economy and Employment and Executive Member for Leisure, Culture and Tourism at regular briefing sessions.**

Metrics in relation to visitor economy are part of the corporate performance reporting framework and progress against the Action Plan will be reported to Corporate Leadership Team and the Executive on an annual basis.

