St Albans Visitor Economy Strategy

2013 - 2018

St Albans
City & District Council

St Albans City and District Council
Visitor Strategy 2013 – 2018

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Executive Summary

The visitor economy in St Albans contributed £160 million in 2010 to the overall economy of the district and provides over 2,500 jobs. It is a sector of economic development with great potential. Nationally the visitor economy is projected to be the fourth fastest growing sector. This strategy is intended to be a road map to unite all those working to support the local visitor economy to ensure that St Albans keeps pace with, and potentially exceeds, national growth.

The visitor economy is a wider and more inclusive concept than tourism, embracing the total visitor experience. It is not just about individual experiences and tourist businesses such as accommodation and attractions although these are important aspects. The visitor economy is also about culture, heritage and retail. It is about creating and maintaining a sense of place, delivering good service and communicating clear messages about the district and all we have to offer.

The strategy was developed between July 2012 and January 2013 through a detailed process of research, consultation and collaboration with stakeholders in the St Albans visitor economy. For the first time the Council undertook research into the attitudes, satisfaction, perceptions and behaviours of our visitors and non-visitors, analysed trends in the visitor economy between 2000 and 2010 and critically compared ourselves to competing visitor destinations. The evidence gathered through this process has been used to identify our overarching strategic aim which we believe is shared by stakeholder's right across the visitor economy spectrum. The strategic overarching strategic aim is "To deliver significant growth in the St Albans visitor economy by 2018".

This strategy is divided into four parts:

Introduction
A description of St Albans' visitor offer and the context in which it is developing.

Purpose of the strategy
A clear statement of purpose relevant to all partners working together to deliver a well planned and managed visitor economy.

Where we are now
This section summarises the current approach to visitor development and highlights key findings from the visitor research and consultation activities. The research provides us a robust baseline of visitor numbers; satisfaction levels; non-visitor perceptions and performance of competitor destinations. It informs our strategic planning and will help us to measure progress over time.

Where do we want to be
This section sets out the overarching strategic aims, principles and detailed objectives of the strategy.

The overall aim of the strategy is:

To deliver significant growth in the St Albans visitor economy by 2018

Put simply we need to increase the number of visitors coming to the district, encourage them to stay longer and to spend more when they are here. To deliver this increase we will need a step change in the way the public, private and community sectors work and plan together. We will need to maximise investment from all available sources and ensure that the overall return in investment benefits both individual visitor economy businesses and St Albans' performance as a visitor destination. As importantly, we need to achieve this growth in a way that balances the needs of residents and the environment with visitors and businesses.

In 5 years time we expect to see a new dynamic brand for St Albans where we are recognised for our welcome and hospitality. This will be measured in a strengthened visitor economy with increased visitor numbers, visitor expenditure and jobs.

Targets	2010	2018
Number of visitors increased by approx. 40%	1.6 million visitors	2.2 million visitors
Total visitor value increased by 55%	£160 million	£250 million
Actual full time equivalent jobs increased by 52%	2,580 jobs	3,930 jobs

We expect the work to improve and develop the visitor economy to be guided by 5 underpinning principles:

1. The visitor economy must be profitable
2. Visitors must have a positive, rewarding experience that they will want to share with others
3. Residents must benefit from the visitor economy
4. The district's environment must be protected
5. The visitor economy must be continuously developed

We expect to deliver the strategy through 4 linked objectives:

1. Raise the profile of St Albans as a quality visitor destination
2. Deliver an exceptional visitor experience
3. Continual improvement of the visitor product
4. Develop and maintain improved planning and communication

How will we get there?

The strategy sets out, for each objective, the actions that will need to be delivered to achieve the desired growth in the visitor economy. It is focused on the public, private and community sectors working together to deliver a shared ambition to grow the visitor economy. It covers areas such as marketing and promotion of the district as a visitor destination, development of the quality and range of our offer, improved market research, better visitor information service provision, skills development and promoting the city centre as a gateway destination to the region.

We will establish a Visitor Economy Advisory Board to oversee the implementation of the strategy. They will be tasked as an early action in year 1 to investigate and recommend the most appropriate governance to drive the management of St Albans as a visitor destination in the longer term.

Key actions in the first year will include:

- A new and dynamic brand for St Albans
- Co-ordinated marketing campaigns
- Development of an image bank
- Investigate 'Purple Flag' status - accreditation for the quality of the night time economy with the view to achieve it in year 2
- Introduction of a 'Welcome Host' skills development programme for front-line staff in the visitor economy
- Investigate joint ticketing including a Heritage Pass
- Develop and disseminate 'Welcome to St Albans' leaflets
- Promote specific visitor products to overseas visitors
- Develop a Christmas market and seasonal visitor experience

Introduction

With its rich cultural heritage and historic cathedral city status St Albans has achieved some success as a visitor destination. The city has great shops, many of which are independent, a bustling market and a large number and variety of cafés, pubs and restaurants. We have many popular visitor attractions including the Cathedral, the Roman remains, Verulamium Museum, Heartwood Forest and Butterfly World. A strong and vibrant independent retail and hospitality sector includes St Albans weekly market and regular farmers markets. The District also has its own distinctive offer with the popular town of Harpenden, pretty villages and idyllic pubs all surrounded by beautiful countryside offering sporting and outdoor activities such as golf, and walking and cycling across a network of footpaths and cycle ways. We have excellent transport links and lie close to London and other centres of population.

Purpose of the strategy

Despite the global financial crisis giving new importance to economic development in the city and district in recent years, research has shown that St Albans is not punching it's weight in the visitor economy compared to its competitors. The visitor economy, which encompasses the businesses which provide the whole visitor experience, has been identified as an important contributor to our overall economy. Visitor spend in hotels, bed and breakfasts, shops, restaurants, pubs, heritage venues and visitor attractions is important to their continued success and also supports a significant number of jobs.

The recession and current budgetary constraints make it increasingly important to identify a sustainable source of funding to support our visitor economy. The pressure on public sector spending in this area means that the Council needs to be clear about our priorities and look at different ways of delivering tourism development services. To grow and develop our visitor economy we will need to identify all potential sources of funding. This will need to include the voluntary and private sectors and demonstrate that this investment both strengthens St Albans' performance as a visitor destination and supports the performance of individual businesses.

Nationally the visitor economy is set to be the fourth fastest developing sector in the UK, growing in England by an estimated 5% (or 3% real value adjusting for estimated inflation) per year between 2010 and 2020.[1] We have developed this visitor strategy to ensure that the visitor economy in St Albans benefits from this projected growth and current market trends. The strategy is intended as a road map to guide businesses, public sector bodies, communities, and regional and national agencies to co-ordinate their work to positively influence the visitor economy and build St Albans' reputation as a leading destination.

If successful this visitor strategy 2013 – 2018 will deliver an increased contribution by visitors to the local economy. It will benefit residents by making St Albans a more desirable place to live and work, helping to create a positive image of the district and engendering local pride. Achieving this will require a concerted and joint effort by the Council, local businesses and community organisations.

This visitor strategy has been informed by a significant amount of research and consultation with local stakeholders in the visitor economy. We conducted original research with visitors and non-visitors to St Albans for the first time in August 2012 and we analysed the performance of the visitor economy between 2000 and 2010. We compared ourselves to other visitor destinations and reviewed national and local data of relevance to our visitor economy.

Links to other Council strategies

This strategy is underpinned by the Council's vision, aims and priorities and is specifically set out in Commitment 4 in the Corporate Plan and Budget Strategy 2013-18.

The Council's commitments are set out below:

1. Protecting the vulnerable
2. Planning for the future
3. Delivering for young people and families
4. Attracting and developing business and the visitor economy
5. Delivering sports and leisure facilities
6. Enabling and delivering transport improvements
7. Keeping the District cleaner, greener, healthier and safer
8. Ensuring value for money and excellent customer service

It is also linked to our plans for economic development, transport and car parking, inclusion, markets, retail and public realm.

The Economic Development Strategy

The Council has identified four priority areas of activity to support economic development - these are:

- **Retail / Public Realm**
  - working with city centre retailers, Retailer of the Year, developing markets, improved parking, improving signage and wayfinding.

- **Developing The District's Strengths**
  - Developing our key sectors including environmental research and business sector, professional services (accountancy and legal); and creative and cultural industries.

- **Business Friendly**
  - Developing the Council's interaction with business; supporting entrepreneurs, after care and retention of local businesses.

- **Visitor Economy**
  - promotion of the district as a high quality visitor destination; supporting events and activities that attract visitors; maintaining a quality museum and heritage offer; providing attractive parks and leisure facilities, launching www.enjoystalbans.com

Where we are now?

The Council aims to provide leadership in the development of the visitor economy. It manages and operates a number of visitor attractions, maintains a high quality public realm (including parks and open spaces), runs a twice weekly market, and provides essential infrastructure to meet visitors' needs. The Tourist Information Centre receives 175,000 visitors a year and provides visitor information services electronically, in print and in person.

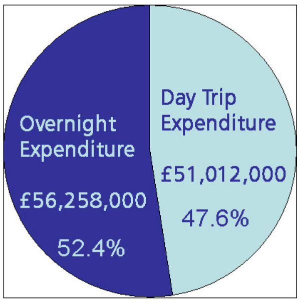
The main promotional tools produced by the Council are the St Albans Visitor Guide produced annually and distributed throughout the UK Tourist Information Centre network, a mini-guide, a small amount of advertising, and representation at a small number of trade fairs. Local businesses and visitor attractions produce marketing material and promote their part of the St Albans visitor offer but currently there is no vehicle to deliver a joined up approach to marketing and promotion to visitors (apart from the annual visitor guide).

In 2012 the Council launched a website dedicated to promotion and marketing of our visitor offer - www.enjoystalbans.com in response to the evidence that visitors are increasingly using the web as a search tool. The quality of this site is much more in line with our competitors and commercial partners. It uses attractive images, carousels and an easy to navigate menu to engage potential visitors. The modular nature of this site will enable new features to be added to keep up with consumer demand. Google Analytics figures show that visitors are spending much longer on this new site than the old, and viewing more pages, indicating that the website is much better suited to users' needs.

Before undertaking this strategy development process we had very little information about our visitors on which to base our operational and strategic planning. The research undertaken for this strategy has provided a wealth of information St Albans' performance as a visitor destination in comparison to competitors. We also have a clearer idea of who our visitors are, and the perceptions of non-visitors. We now have a baseline on which we can set targets and monitor performance over the next five years. The visitor strategy evidence base is attached as Appendix 2

Visitor numbers, spend and profile

The visitor research conducted in August 2012 demonstrated that the quality of our visitor product is good when compared to other destinations. However, our analysis of trends over the last 10 years shows that the number of visitors attracted is low when compared to our competitors. Between 2008 and 2010 the number of visitors to St Albans grew by 7%[2], with an average growth of 2.3% per year. This is relatively low when compared to competitor destinations such as Winchester and Salisbury.



2010 – Overnight Vs Day trip expenditure

In 2010[3] the district received around 1.6 million visitors of which 1.3 million were day visits and 0.3 million were staying visits. At 19% our staying visitors constitute a higher proportion of our overall visitors than comparable destinations. Of the 0.3 million staying visitors the majority were from the UK with 58,000 from overseas. Overseas visitors represent 19% of overnight visitors.

The total spend by visitors in 2010 was £107.27 million with 47.6% spend by day visitors and 52.4% by overnight visitors. Total visitor value including induced and indirect spend was £160 million. Indirect value is composed of the goods and services that visitor economy businesses purchase from their suppliers and induced value is composed of expenditure by employees from wages paid by visitor economy businesses.

The visitor economy supports 2,580 jobs in the district.

Spend per head for the overnight visitor is higher than the day visitor. Such visitors stay longer and spend more money on accommodation. On average, overseas visitors staying overnight spend more than UK visitors staying overnight, as the average length of their stay is longer, meaning they spend more on accommodation.

The visitor research undertaken in 2012[4] has given us a broad profile of our visitors.

- Visitor numbers are broadly spread across the age ranges, with the largest group (40%) made up of families.

- The main reason for visiting was leisure at 46% followed by visiting friends and relatives (VFR – those visitors who stay in private accommodation of friends and relatives overnight) at 25% and shopping at 21%. At 1%, visiting for business/conferences is very low but it is thought that this is due to the visitor research being conducted in August.

- When in the district, shopping was the most popular activity, followed by eating out and VFR.

- 26% of visitors travelled to St Albans by public transport (with 15% by bus or coach and 11% travelling by train). The remaining 74% arrive by car.

Satisfaction and perception

In our research with visitors we found high levels of satisfaction with key elements of the visitor offer leading us to believe that the quality of our visitor product is high when compared to other heritage cities. The spider diagrams below are based on the 2012 visitor research.

Fig. 1

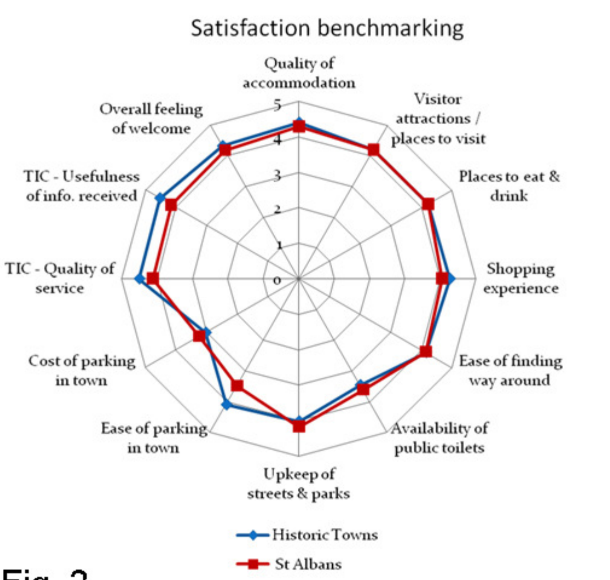


Fig. 2

However these diagrams show that satisfaction in two areas, parking and Tourist Information Centre (TIC) demonstrate the need for improvement. Visitor satisfaction with the cost and ease of parking is lower than the importance they place on this element of the visitor experience. It will be necessary to consider the needs of visitors in any new developments addressing parking as part of a broader approach to facilitating visitors to travel to and around the district.

The quality and usefulness of the TIC is rated slightly lower than that of other heritage cities. This is in part as a result of the size and location of the facility. This will be addressed through the proposed development of the Town Hall as a cultural hub incorporating museum, gallery and visitor information services in a state of the art facility designed to meet the needs of 21st century audiences

Our research with non-visitors[(5)] highlighted the issue of St Albans' profile. 30% of people did not know where in the UK St Albans was located. However, after seeing photographs of the city and district, 88%[(6)] of those non-visitors (who had not visited St Albans for at least five years, if ever), said that St Albans would be a place they would either definitely visit, or might well visit, in the near future.

How do we compare to other destinations?

The number of visitors St Albans attracted in 2010[(7)] was low when compared to similar destinations such as Shrewsbury, Winchester, Lincoln, and Canterbury.

City	Number of Visitors	Year	Resident Population
St Albans (District)	1.5 million	2010	68,000 (140,000)
Shrewsbury	2.6 million	2007	96,100
Winchester	4.6 million	2009	44,700
Lincoln	3.4 million	2010	93,100
Canterbury	3.3 million	2008	43,400

We can assume from this evidence that these destinations are better known by potential visitors than St Albans. Whilst we did not investigate in detail why St Albans is not better known with potential visitors we looked at some of the factors contributing to the success of our comparator destinations.
The key factors are:

- Clear brand, shared and understood by all stakeholders
- Resources for marketing and promotion
- Understanding of the market
- Focus on sustaining and developing a quality product
- Partnership working and communication
- Planning and leadership

For instance Winchester have a well-developed partnership approach to managing and promoting the visitor economy, they look for ways to continually re-fresh their product, engage in co-ordinated marketing and have a coherent and recognisable brand.

In St Albans our brand is not clear, our co-ordination across the full spectrum of agencies and businesses working in the visitor economy is weak and we do not work together to maximise the benefits from our individual investments in marketing and promotion.

One important influence affecting visits to St Albans is its proximity to London. This is considered to be both a positive and a negative factor as there are both opportunities and threats from having such a huge destination on the doorstep. The opportunities include - 20 minutes rail service to London St Pancras Station; hotels offering better value for money than in Central London; a destination offering a good day trip from London with comparatively short travel times. The main threat is that coach companies have a tendency to leap-frog St Albans because we are too close to London for day trips. As we are just outside of the M25 ring, coach tours out of the capital have a tendency to take visitors for at least 1-2 hours on the coach which is a perfect distance for destinations such as Oxford and Cambridge.

Stakeholders in the Visitor Economy

We have identified 6 key groups of stakeholders important in developing and improving the visitor economy in a sustainable way.

Businesses
Includes attractions (Cathedral, Roman Theatre, Verulamium Museum, Butterfly World), theatres (Alban Arena, Abbey Theatre etc), restaurants, cafés, retailers, pubs, markets, hotels and other accommodation providers, etc. who are located in or nearby the City and District of St Albans.

The Council
The visitor economy is an important contributor to the overall economy of the district and visitors are important to the financial viability of the visitor attractions managed by the council. It is also a provider of local infrastructure and services.

Surrounding towns and villages
Visitors contribute to the success of local economies and to sustaining businesses across the district, in the towns and villages. In turn many surrounding towns and villages are attractions in their own right.

Residents
This includes those living in or nearby the city and district of St Albans, who have a personal stake in the success of the local economy, and contribute to the welcome that visitors receive. They also play host to their families and friends, an important visitor segment.

Leisure Visitors
We include day and overnight visitors (UK and overseas) in this group.

Business visitors
Those visiting the area because of activities relating to work, these might be day trip or overnight visits to attend meetings or conferences in St Albans district.

Where do we want to be?

In 2018 St Albans will be a city and district where the needs of the visitor, business, community and environment are in balance and the visitor economy makes a significant contribution to the quality of life. We will be recognised for the quality of our welcome and hospitality. Our performance will be improved to the level enjoyed by the best of our competitor destinations because we have a well planned and developed visitor economy. The Council, partners and stakeholders will work together to manage growth in a coherent way. We will achieve high satisfaction ratings from both residents and visitors.

Principles

We expect the work to improve and develop the visitor economy to be guided by 5 underpinning principles:

- The visitor economy must be profitable
- Visitors must have a positive, rewarding experience that they will want to share with others
- Residents must benefit from the visitor economy
- The district's environment must be protected
- The visitor economy must be continuously developed

Aim

The overarching strategic aim is:

To deliver significant growth in the St Albans visitor economy by 2018

Put simply, we need to increase the number of visitors, encourage them to stay longer and spend more when they visit. We need to attract more visitors in our core market sectors and raise their satisfaction levels in our core visitor so they will visit again and promote the experience through word of mouth. At the same time we need to develop new markets and ensure a high level of experience on which to build for the future.

Issues

Our research has shown us that the quality of St Albans as a visitor destination is good and comparable to other historic cities. However comparable destinations attract more visitors and visitor expenditure than we do. We have therefore concluded that we need to address a number of issues identified through the research and consultation.

These are:

- Lack of a clear and dynamic brand
- Profile of the city, district and visitor offer
- Understanding of the existing and potential market
- Resources and approach to marketing
- Up-selling and cross marketing between visitor economy businesses
- Lack of effective co-ordination and partnership working

Also, due to the high turnover of staff, and because low level visitor sector staff very often live outside of St Albans, we would like to introduce a 'Welcome Host' style training programme to ensure all front line staff are knowledgeable about St Albans, the district and all it has to offer.

Opportunities
However there are also some opportunities;

- Product development, e.g. the proposed new museum and gallery in the Town Hall and improvements to the Cathedral.
- The Cathedral's inclusion in the international Green Pilgrimage Network.
- Improved leadership and partnership working between the stakeholders.
- New and improved website (www.enjoystalbans.com) which will continue to be developed to include facilities to give feedback. Feedback can also be collected on social internet sites such as Facebook and Twitter.
- Under-developed and emerging markets, e.g. business visitors, green visitors, food visitors.
- Significant population living within range of a day trip to St Albans.
- Proximity to London is a positive marketing message because of our excellent travel networks.

Target Markets / Audiences
We need to raise the profile of the visitor offer with a range of audiences and to this end we will be working to segment our market more effectively and target product development and communication. However we have identified some market segments on which to focus product development and more effective marketing in the early stages of the strategy implementation. These are described below:

Residents
We have identified our residents as an important set of stakeholders and will target a number of communication activities at them. Nationally, the VFR market trend is set to continue and as this group is already a significant part of the St Albans market we wish to capitalise on this group by generating higher spend per head and increase their numbers. Active and two way communication with residents will build their knowledge and understanding of our visitor offer, and will engage them as champions for the city and district.

Families
The 2012 research indicates that families make up 40% of the current St Albans visitor market. As with VFRs we will seek to generate higher spend per head from this group and increase their numbers. We will improve the development and marketing of family friendly products and experiences.

Day-trippers
We have identified that there is a significant market within range of a day trip to St Albans. We currently do not promote this experience particularly actively or cohesively. We will market this experience working with our transport partners and aim to generate higher spend per head and increase their numbers.

Overseas visitors
We have identified this as a potential growth market with higher spend than other visitors in our current visitor profile. We will work with gateway destinations and carriers such as London St Pancras, Luton Airport, First Capital Connect, Eurostar and Easyjet to encourage visitors visiting from abroad to stop at St Albans. We will also target the established 'Twin Towns' connected with St Albans, Harpenden and the villages in the district, as we already have an established 'fan base' in those locations.

New Markets
In terms of new markets, we will develop specific products and target those markets that are currently under-developed and that match potential growth areas in the national visitor economy. At present, we know these are business visitors, group visitors and Christmas visitors as spend per head in these groups is high. The recent planning approval for new hotels in St Albans in the next three years will assist us in increasing visitors from these markets, but until these are built, improved product development, differentiation and marketing will be undertaken. For instance we are investigating the feasibility of developing a Christmas Market and experience with the Cathedral and retail partners.

Visitor Strategy outcomes

In 5 years time we expect to see a new, dynamic brand for St Albans and an increase in the number of visitors, expenditure and equivalent jobs.

Targets	2010	2018
Number of visitors increased by approx. 40%	1.6 million visitors	2.2 million visitors
Total visitor value increased by 55%	£160 million	£250 million
Actual full time equivalent jobs increased by 52%	2,580 jobs	3,930 jobs

Visitor economy objectives and actions

We will achieve an increase in the contribution of the visitor economy to the overall economy through the delivery of 4 linked visitor economy objectives. These are set out below with detailed year one actions in the St Albans Visitor Strategy 2013 – 2018 Action Plan. (See Appendix 1).

Objective 1 – Raise the profile of St Albans as a quality visitor destination
We will:
- Develop and implement a brand strategy for St Albans that is shared, understood and used by all organisations and businesses working in the visitor economy.
- Increase awareness of St Albans and all it has to offer through additional marketing.
- Establish a co-ordinated marketing approach across all sectors of the visitor economy to ensure a sustainable balance of visitors by market segment, value and volume.
- Undertake further analysis of the market to improve market segmentation.
- Maximise the benefits of new technology in promotion and marketing.
- Identify opportunities to share existing promotion and marketing tools, e.g. create an image bank.

Objective 2 – Deliver an exceptional visitor experience
We will:
- Deliver an inspirational welcome at main entry and key visitor information points.
- Develop sales and marketing tools that help the visitor to experience the whole of the visitor offer, e.g. joint ticketing.

- Improve the quality of accommodation and other businesses in the visitor economy to stimulate repeat visits, encouraging the use of quality assurance schemes, e.g. attain Purple Flag status.
- Research and monitor the quality of the visitor experience.
- Develop a continual programme of skills development in welcoming visitors to improve customer care and visitor satisfaction.
- Maintain and improve a quality public realm, including effective signage for visitors.

Objective 3 – Continual improvement of the visitor product
We will:

- Develop customer focused products and packages targeted at market segments to increase overnight stays, e.g. develop a Christmas market, develop products for overseas visitors.
- Develop products that will attract high expenditure, e.g. products that encourage visitors to stay longer or for an extra night.
- Develop products that will drive business in both the rural and urban economy for example packages and joint ticketing. This would also include capitalising on nearby attractions just outside of the district such as the Harry Potter studio tours, Hatfield House, Shaw's Corner, De Havilland Aircraft Heritage Centre and Willows Farm Village.
- Develop products that are inclusive and accessible.
- Develop incentives to encourage repeat visits as well as visits to a broader range of attractions.
- Develop initiatives that will support retailers, especially independent shops, as shopping is the main visitor activity.
- Continue to work together to attract investment to improve and support new key visitor attractions such as the Town Hall project which will improve both the Museum of St Albans and the Tourist Information Centre as well as providing a gateway attraction.
- Work with existing public transport providers to develop products to encourage visitors to visit St Albans by public transport.

Objective 4 – Develop and maintain improved planning and communication
We will:

- Establish a robust and sustainable partnership between the public, private and community sectors to manage and drive improvements in St Albans as a visitor destination such as improvement to the car parks.
- Continue to develop and use accurate and timely intelligence on the visitor economy.
- Strengthen existing and establish new networks of businesses working in the visitor economy.
- Identify all possible sources of funding to contribute to the delivery of a sustainable approach to the management of St Albans as a visitor destination.

How we will deliver this strategy

The strategy development has benefited from a high level of partnership working. Internal and external stakeholders to the council have been involved in focus groups, in reviewing the evidence base and proposing actions to improve the visitor economy. It is proposed to build on this momentum by establishing a Visitor Economy Advisory Board to oversee delivery and monitor progress. The Visitor Economy Advisory Board will include representatives from key stakeholder groups who contribute to and benefit from the visitor economy.

The lead officer in the council with responsibility for supporting the Board and delivery of the strategy will be the Culture and Heritage Services Manager, who will work closely with colleagues in the council and the Portfolio Holder with responsibility for the visitor economy to ensure that the council maximises its contribution to achieving the aims and objectives set out in this document.

The council's Visitor Team, including the Visitor Manager, Visitor Development Officer and the Tourist Information Centre staff will provide operational capacity and the secretariat for the Visitor Economy Advisory Board.

The council will seek to maintain our existing financial commitment to marketing the visitor economy, delivery of visitor information services and support for events and activities that attract visitors to the district. Stakeholders will work together to identify opportunities where they can invest in developing the visitor economy alongside the Council. To drive the improvements, funding from other sources will be sought to move St Albans up the ladder as a must-see, quality visitor destination from a wider range of visitors.

Key actions in the first year will include:

- A new and dynamic brand for St Albans
- Co-ordinated marketing campaigns
- Development of an image bank
- Investigate 'Purple Flag' status - accreditation for the quality of the night time economy with the view to achieve it in year 2
- Introduction of a 'Welcome Host' skills development programme for front-line staff in the visitor economy
- Investigate joint ticketing including a Heritage Pass
- Develop and disseminate 'Welcome to St Albans' leaflets
- Promote specific visitor products to overseas visitors
- Develop a Christmas market and seasonal visitor experience

How we will measure our success

St Albans City & District council aims to monitor key performance indicators (KPIs) to give a comprehensive picture of the state of the visitor economy to stakeholders periodically.

Key Performance Indicator	Rationale	Frequency & Data source	2010 figures	Target
1. Total number of visitors	This is one of the key pieces of data measured by all destinations. It allows comparison with our competitors and trend analysis over time.	2015 (2013 Data), 2017 (2015 Data) & 2020 (2018 Data) (Tourism South East reports)	1,600,000	40% growth profiled across the period
2. Total Visitor Expenditure (including indirect and induced expenditure)	This is one of the key pieces of data measured by all destinations. It allows comparison with our peers and trend analysis over time.	Every 2 years (Tourism South East reports)	£160,277,000	55% growth profiled across the period
3. Total actual jobs (including indirect and induced jobs)	This tells us how much extra employment any growth in the visitor economy supports. It is an indicator of the value of the visitor economy to the local community.	Every 2 years (Tourism South East reports)	2,580	52% growth profiled across the period
4. Average accommodation occupancy rate	This indicates the health of the accommodation sector. It also indicates whether there is an over or under-provision of bed spaces, which informs future planning. Average accommodation occupancy rates can also be compared nationally.	Quarterly (Outsourced collection of occupancy rates)	Unknown	
5. Average visitor satisfaction rating (averaged over 12 different areas of importance for visitors)	This allows stakeholders in the district to understand whether visitor expectations are being met. It highlights areas where standards may be slipping and where increased focus is needed.	Every 3 years (Outsourced visitor survey)	3.99 out of 5 (5 indicates very satisfied)	4 out of 5

Key Performance Indicator	Rationale	Frequency & Data source	2010 figures	Target
6. TIC visitor numbers (to include telephone, email enquiries and Visitors to the destination website www.enjoystalbans.com)	This provides a general indication of the annual growth in the volume of visitors to the destination. Web usage statistics give an indication of the interest potential and actual visitors, as well as residents, have in planning a trip to St Albans.	Quarterly (TIC data & Council Web usage data)	Approx. 130,000	10% growth
7. Return on Investment (Council spend compared to total visitor expenditure)	This allows the Council to monitor the financial benefits to the district of its investment in the visitor economy. The success of the visitor strategy may partly be measured by looking at return on investment.	Every 2 years (Council budgets compared to Tourism South East data)	£5,343 return to the economy for every £1 invested	

This strategy will be reviewed at the end of 2014 and each year thereafter. A revised action plan with SMART outcomes, based on the objectives outlined in this strategy will be developed after each review.

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