

# WEST MIDLANDS TOURISM RECOVERY PLAN

Short-term Priorities & Actions  
2021-2023



**WEST  
MIDLANDS**  
GROWTH COMPANY



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# INTRODUCTION

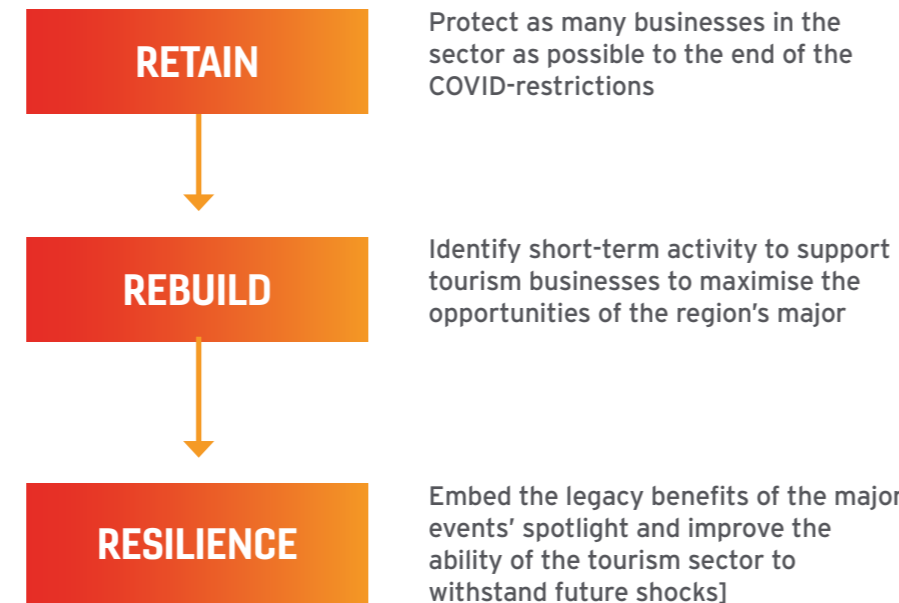
This document is an update to the West Midlands 10-Year Tourism Strategy 2019-2029, focusing on the short-term from April 2021 through to spring 2023. The mid/long-term objectives within the 10-Year Tourism Strategy are still relevant today, even more so now.

The update sets out the strategic priorities and actions for the West Midlands -for the tourism industry partners, destinations, local authorities, Destination Management Organisations (DMOs) and the West Midlands Growth Company (WMGC) - for the next 18 months to maximise tourism opportunities for the region's COVID-19 recovery.<sup>1</sup>

Due to the coronavirus pandemic, the West Midlands saw a 56% drop in visitor numbers to 59.4m in 2020, with spend falling from £13.1bn to £5.7bn. When looking at 2020 overall, VisitBritain's 2020/21 annual report recorded an inbound spend fall from £28.4bn in 2019 to an estimated £5.7bn in 2020, a drop of 80%, and domestic from £91.6bn to £34.4bn a drop of 62%. They estimate £285m was lost to the economy every day from tourism.

This action plan has been developed within the context of wider national and West Midlands policies and strategies including the Department for Digital, Culture, Media & Sport (DCMS) National Recovery Plan, regional Build Back Better initiatives, local authority recovery plans, and the West Midlands Combined Authority (WMCA) Sustainability policy.

This recovery plan sets out the objectives we need to deliver, so that together, we can:



<sup>1</sup>When looking at 2020 overall VisitBritain has forecast a decline of 76% in visits to 9.7 million and a decline of 80% in spending to £5.7 billion. This would represent a loss versus VisitBritain's pre-COVID forecast of 32.3 million visits and £24.7 billion spending. Overall, VisitBritain is forecasting 16.9 million inbound visits in 2021. While this is an increase of 73% on 2020, it is less than half of the 40.9 million visits the UK saw in 2019, VisitBritain's Inbound Tourism Forecast for 2021, Winter 2020.

<sup>2</sup>Government funding including the High Streets Fund, Welcome Back Fund, Towns Fund and Levelling Up Fund.

<sup>3</sup>Research evidence from the Centre for Cultural Value and the Centre for Cities shows that young people and people within marginalised communities have been disproportionately affected financially by the pandemic, alternatively more affluent communities have benefitted financially. 'Is Covid the great un-equaliser?', Centre for Cultural Value, <https://www.culturehive.co.uk/impact-of-covid-19/>, accessed 23 May 2021; 'Coronavirus', Centre for Cities, <https://www.centreforcities.org/coronavirus/>, accessed 23 May 2021.

## NATIONAL CONTEXT

Since the writing of the 10-Year Tourism Strategy, the world has seen unparalleled change from the impact of the COVID-19 pandemic. The long-term impacts are still unknown, but the expectation is that tourism will be fundamentally altered. In the short-term, it is widely acknowledged that the travel, tourism, hospitality, events, arts, culture and heritage sectors have been the hardest hit economically with the majority of businesses within those sectors (public and private) either completely closed, partially closed or pivoting to hybrid business models, with severe impacts on their staff and supply chains. Government interventions such as the Coronavirus Job Retention Scheme (CJRS), business rates rebates and the Culture Recovery Fund have contributed towards securing jobs and skills within these sectors including across the West Midlands.

Further Government funding including the High Streets Fund, Welcome Back Fund, Towns Fund and Levelling Up Fund, to name a few of the numerous new initiatives, have been allocated or are likely to be allocated to many of the cities and towns across the West Midlands as part of their short-term COVID-19 Recovery at a local level.<sup>2</sup> There is a danger that a lack of a regional strategic overview could lead to missed opportunities to maximise the coherence of the potential outputs.

Although it is encouraging to see place-based investment starting to happen, it is too early to understand how these investments may impact on sector-specific plans. Research evidence from the Centre for Cultural Value and the Centre for Cities shows that young people and people within marginalised communities have been disproportionately affected financially by the pandemic; while some more affluent communities have benefited financially. As one of the UK's most culturally diverse and youthful regions, parts of the West Midlands have therefore been more adversely affected by COVID-19.<sup>3</sup>

<sup>4</sup>VisitBritain and British Council annual international propensity to travel surveys

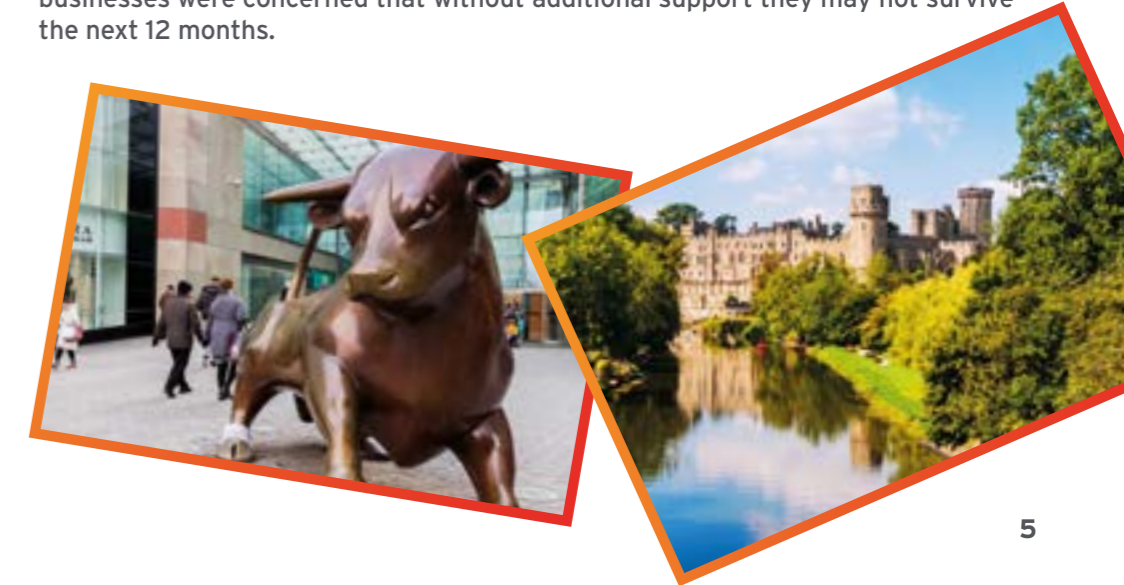
<sup>5</sup>90% of tourism sector businesses had closed at some point through lockdown, 48% had seen revenue drop by 75% or more, 70% had reduced employee hours and 40% had made redundancies, while 44% say their performance had been worse than expected. And 80% of businesses were concerned that without additional support they may not survive the next 12 months, West Midlands Growth Company's Covid-19 Tourism Impact Survey, October 2020; The tourism sector will not recover to pre-Covid-19 levels of 133.9m annual visits and £13.1bn annual visitor spend until 2024, but the Commonwealth Games will contribute an extra 10% to the economy in 2022 in both value and volume terms, West Midlands Growth Company, 2021-2022 projections.

## IMPLICATIONS FOR THE TOURISM INDUSTRY

The government's de Bois review of the DMO landscape across England has been submitted, and its findings endorsed by the West Midlands Board for Tourism. Meanwhile, the WMGC will and should continue to deliver a hub and spoke tourism provision for the region, working closely with its shareholders to deliver the strategic overview and integration at a sub-regional level.

Whilst the impacts of the UK leaving the EU are somewhat hidden by the immediacy of the COVID-19 pandemic, the tourism industry anticipates that the changes in international travel regulations will have a short to medium-term impact on the UK as a premier destination of choice for some international markets; but it is still seen as a wish-list travel destination internationally.<sup>4</sup> International inbound and outbound tourism may grow in 2022, though not at full capacity or at pre-COVID levels until 2023/4. The shift to domestic tourism will, of course, further impact negatively on Birmingham Airport where the bulk of the traffic is outbound.

The fallout from the impact of the COVID-19 lockdowns will extend far beyond the point of re-opening.<sup>5</sup> The WMGC COVID-19 Tourism Business Sentiment Survey from October 2020 found that 90% of tourism sector businesses had closed at some point through lockdown, 48% had seen revenue drop by 75% or more, 70% had reduced employee hours and 40% had made redundancies, while 44% say their performance had been worse than expected. And 80% of businesses were concerned that without additional support they may not survive the next 12 months.



## LEISURE TOURISM

VisitBritain and Association of Leading Visitor Attractions COVID-19 Consumer Sentiment research studies show that there is pent up demand for travel amongst certain UK resident groups, including Visiting Friends and Relatives (VFR) markets, younger people and families, both domestically and internationally. This can be seen in the increase in bookings for live events and festivals (with reduced capacity), self-catering accommodation and searches for outbound flights to overseas destinations for this summer.<sup>6</sup>

However, the vaccine roll-out may accelerate older age groups to travel. Coastal and rural destinations in the UK are still likely to be the priority destinations for many tourists in 2021 due to the perception of safety in outdoors locations and their intrinsic appeal for families, especially as the younger sectors of the population will not yet have been vaccinated. There is strong interest among domestic travellers to visit urban and rural destinations, providing an opportunity for both cities and towns in the West Midlands area and countryside/village destinations, according to VisitBritain's COVID-19 Consumer Sentiment Tracker.

The West Midlands region, in comparison to many others, has not been as adversely affected by the restrictions to inbound international travel due to its relatively low numbers of international visitors pre-COVID-19. Therefore, there is a major opportunity to focus on growing the domestic tourism market in the short-term.

The region has many, yet lesser known, spectacular attractions in outdoor settings that could capitalise on the demand for outdoor experiences, particularly as visitors look for days out and short breaks closer to home, or safe places to meet with friends and family, but it isn't a key association with the region.<sup>7</sup> It is likely that city/town destinations will have to work harder to generate leisure visits, especially overnight, and particularly for those in the West Midlands that are not currently perceived as leisure tourist destinations, and therefore the reopening of the live events sector, which is so significant for the region, creates reasons to travel.

<sup>6</sup> Research studies show that there is pent up demand for travel amongst certain UK resident groups, including VFR markets, younger people and families, both domestically and internationally. However, the vaccine roll-out may accelerate older age groups to travel. Coastal and rural destinations in the UK are still likely to be the priority destinations for many tourists in 2021 due to the perception of safety in outdoors locations and their intrinsic appeal for families, especially as the younger sectors of the population will not yet have been vaccinated. There is strong interest among domestic travellers to visit urban and rural destinations, providing an opportunity for both cities and towns in the West Midlands area and countryside/village destinations. VisitBritain's Covid-19 Consumer Sentiment Tracker; Association of Leading Visitor Attractions Covid-19 Consumer Sentiment Tracker.

<sup>7</sup> West Midlands Tourism Strategy 2019-2029 Research and Evidence Deck

<sup>8</sup> The slow return to business travel is illustrated in YouGov data from May 2021. This shows no significant change in intent to travel nationally or internationally for business over the last six months, p.56, Section 7, WMGC Tourism Update Research and Evidence Deck, May 2021.

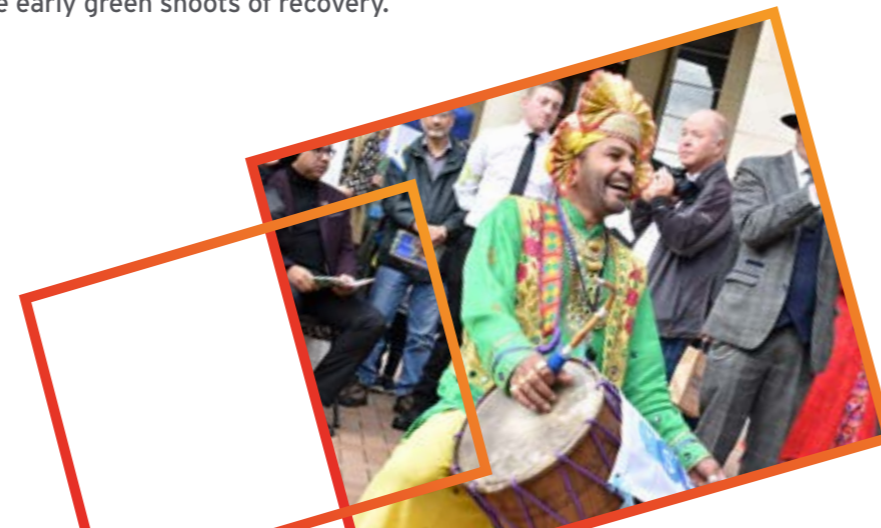
Summer 2021 in the West Midlands can become a testbed not only for reopening the sector and welcoming new visitors, but crucially gearing up for summer 2022.

Competition for business and leisure tourism in 2021/22 will be fierce as destinations invest more heavily than usual in domestic tourism campaigns and it will become increasingly difficult for destinations to achieve cut through with messaging in overcrowded marketplaces, unless they articulate clear and compelling narratives and messaging. Some UK competitor destinations already have live domestic tourism campaigns running and are investing substantially in new content to support these campaigns.

## BUSINESS TOURISM

For business tourism, there are some green shoots of recovery as enquiries for autumn 2021 and 2022 restart, although the emphasis is on 2022 as the year when major conferences, exhibitions and Meetings, Incentives, Conferences and Exhibitions (MICE) return more fully.

There are early signs that national/international conferences and exhibitions will look to harness learnings from their pivot to online in 2020, to create hybrid in-person and virtual events enabling businesses to extend their reach further nationally and internationally. Discussions with large venues suggest that there is pent up demand for companies to meet clients and do business face to face and to network in person. Promoting the depth, breadth and flexibility of the business tourism offer across the region to identified target markets, with associated COVID-secure and accessibility messaging, will be essential to convert those early green shoots of recovery.



## MAJOR EVENTS IN THE WEST MIDLANDS

The West Midlands has a once in a generation opportunity to galvanise local residents, businesses and visitors to leverage opportunities from the upcoming major events of Coventry's UK City of Culture 2021 and Birmingham's 2022 Commonwealth Games and to become a focal point for national celebration. It also has resources to put behind building momentum. As cities, towns and regions across the UK focus on reopening post COVID-19 lock-down for summer 2021, the West Midlands has the potential to use these major milestone moments supported by other events and major capital developments to fast-track its recovery as it builds back better with environmental sustainability, equality, diversity and inclusion values and actions at its core. The WMGC's Business and Tourism programme (BATP) which is now underway, has been set up to specifically leverage the domestic and international business and leisure tourism, international trade and inward investment potential for the region as a result of the Commonwealth Games.

## MAINTAINING SHORT TERM FOCUS

Whilst the industry is in flux, it is critical that the West Midlands region seizes the advantage of upcoming major events as the catalyst for the step-change in perception, awareness and visibility of the West Midlands tourism offer. The required partnerships and collaboration between and across sectors will be crucial to ensure that the region's tourism economy recovers and grows beyond its pre-COVID-19 levels.

In building back better, the crisis presents an opportunity to ensure a fairer distribution of tourism's benefits and advance the transition towards a carbon-neutral and more resilient tourism economy. Recovery must involve transforming the tourism sector, reinventing tourism destinations, rebuilding the entire tourism ecosystem, and innovating and investing in sustainable tourism.



## SHORT-TERM AIMS & OBJECTIVES

This action plan has two overarching aims:

1. To build capacity with the region's tourism industry through collaboration and partnership working to support new and enhanced product development, improving skills such as digital marketing, readiness to open safely and securely, contributing towards robust evaluation, and relevant initiatives that support the sustainable and inclusive growth of the visitor economy.
2. Promote the region to target domestic and international markets.

The following short-term objectives as outlined in the 10-Year Tourism Strategy, still form the core objectives of this update action plan:

- Improve image and perceptions of the region to UK audiences
- Raise visibility and awareness of the region to international markets
- Support and leverage the region's major events
- Develop leisure product using hero themes, attracting visitors across the region
- Ensure greater awareness of the business tourism product
- Provide new jobs and skills for people living in the region

# STRATEGIC PRIORITIES & ACTIONS

Following an analysis of recent tourism and COVID-impacts research and discussions with major stakeholders in the region, a number of strategic priorities have been identified.



# 1. BRAND IDENTITY AND ACTIVATION

The original research for West Midlands Tourism Strategy 2019-2029 revealed a lack of awareness and knowledge of the region and / or outdated perceptions of it. This still stands.

In 2019, there was no appetite from stakeholders to address this via consumer facing applications of the 'West Midlands' brand identity - and it is clear from consultations that the feeling remains. As stated in the 2019-2029 Tourism Strategy, national and international perceptions research highlighted that there is strong brand recognition for individual places such as Birmingham, Stratford, Warwick and tourism brands including Shakespeare, Cadbury's World and Warwick Castle. In any case there is no consumer facing West Midlands' infrastructure in place to drive activity in the short-term, and whilst a temporary brand is being created to support the delivery of the BATP programme, and connect the region's destinations, it is neither intended nor resourced to become embedded.

That doesn't mean to say that building a regional proposition of scale via packages, itineraries and joint messaging isn't relevant, but that the approach needs to recognise that leisure tourism visitors engage with the region's distinctive destinations, attractions and events rather than the West Midlands per se. Leading with hero products and themes that can carry and amplify the key brand messages and stories about the wider region remains the required approach - and the short-term action plan needs to focus on WMGC enabling the partnership working, joining-up the offer, creating coherent, flexible packages, to reach bigger, broader markets and spread the benefits and impacts. For business tourism making clear and strong links with the region's industry, knowledge sector and wider infrastructure such as transport makes for important and significant positioning.

Resonant brands and hero themes like the Birmingham culture and hospitality city-experience, Shakespeare and Peaky Blinders are still relevant to talk to the region's international cultural credentials and globally significant industrial heritage. There are 'new' stories for the region to celebrate - reopenings and openings such as Coventry UK City of Culture; brand new public realm in the City of Birmingham; and places that the 2019 strategy marked as secondary which will come to the fore in a year when the focus is on outdoor experiences - Warwick and Kenilworth Castles, Black Country Living Museum, Compton Verney, waterways, country parks and formal gardens - and outdoor sports events. Outdoors isn't natural 'association' territory for the 'industrial' and landlocked West Midlands and so increased activity will bring an opportunity to tell a different story of the region - to connect the outdoor city, town and village experiences, the greenways and blueways.

Reopening campaigns will respond to the 2021 public mood as well as foreground the region in the lead up to the Commonwealth Games in 2022. There will be challenges such as potential PR-fall out from issues such as overcrowding, litter, public toilets, transport/congestion; from events being cancelled and cultural venues, especially indoor, not opening fully in the summer. It will be essential to work with local authorities and key delivery partners to an agreed reopening standard and establish and support the cross-regional partnerships at a time when capacity is stretched.

## ACTIONS

- Agree the priority hero products and brand signifiers that relate to the Hero Themes identified in the 2019-2029 Tourism Strategy - consider widening the cultural elements of this to focus more heavily on the distinctive cultural offer of the region
- Anticipate and navigate/resolve reopening and logistics challenges with partners
- Establish a West Midlands reopening 'standard' to ensure positive PR
- Plot a messaging programme - spring/ summer/ autumn/ winter and so on, in alignment with the lead up to 2022
- Establish and support the key partnerships in terms of delivery, use of channels, PR support and provide toolkits for partners where possible
- Support the development of packages and itineraries - this will become easier as the BATP Digital Visitor Information Network (DVIN) infrastructure is put in place during 2021
- Refresh the narratives to link to hero themes but bring relevance to younger and more diverse audiences - e.g. history and heritage via Peaky Blinders; Black-owned festivals, film and TV
- Pilot planned initiatives for summer 2022 - such as cross regional tourism routes; or laying the ground for DVIN implementation and roll out
- Capture content that can be used and also repurposed in the lead up to and during 2022
- Underpin with world-class welcome and visitor experience



## 2. LEVERAGING OUR MAJOR EVENTS

The West Midlands region will play host to one of the biggest multi-sport international events drawing worldwide television audiences in 2022 providing an opportunity to showcase what the region has to offer.

Whilst it is now highly unlikely that the projected numbers of international tourists will visit Birmingham and the region, the legacy of the Games, from a tourism perspective, will be determined by positive changes in perception and future inbound travel from Commonwealth markets.

The successful delivery of Coventry's UK City of Culture programme from May 2021-May 2022 will build confidence locally and demonstrate the region's capacity and ability to stage safe, secure and inspiring events with sustainability and inclusion at their roots.

But Coventry City of Culture 2021 and the Birmingham 2022 Commonwealth Games are not the only milestone markers for the region. In early 2022 Wolverhampton will be the first English location to host the British Art Show 9, Coventry will be one of the host locations for the Rugby World League Cup, while Edgbaston will host The Hundred cricket event and one of the England v New Zealand test matches. And there is a raft of new signature restaurants, hotels and leisure attractions due to open across the region.



### ACTIONS

- Resource the WMGC Tourism team to enable a successful delivery of the BAPF programme, through recruitment of staff and marketing agencies
- Embed partnership working with UK Coventry City of Culture 2021 and Birmingham 2022 Commonwealth Games teams & Cultural Festival; and cultural venues and connections
- Ensure consistency of business-to-business messaging and communication with the tourism sector across the region to generate stakeholder engagement and participation in joint marketing campaigns
- Build momentum with domestic tourism markets through 2021 into 2022 using milestone hooks in campaigns to create reasons to visit now and encourage repeat visits
- Work with partners to develop appropriate skills to maximise profile and reach for tourism marketing activity, e.g. digital
- Develop relationships with commercial partners (within Games compliance regulations) to extend the reach of domestic leisure tourism campaigns, e.g. rail operators, media
- Identify talent pathway opportunities for Coventry UK City of Culture 2021 and Games 2022 volunteers to support the wider tourism sector in partnership with academic institutions
- Maximise insights from the West Midlands Cultural research project



# 3. DIGITAL TRANSFORMATION

Since the 2019 strategy was written, the tourism and cultural industries globally have become much more cognisant of the need to embrace digital technologies.

The pandemic 'rush to digital' made it clear that few were ready, revealing weaknesses in content, infrastructure and skills nationally (and internationally) at all points of the industry which need addressing.

Whilst digital transformation is a theme which cuts across all areas of the strategy - it is so important that it needs highlighting as a priority focus and the opportunities and advantages are significant for destinations which can get ahead in the digital arena.

Through the tourism strategy WMGC is well placed to take a regional lead, capitalise on the drive, resources and momentum provided by the Commonwealth Games 2022 and draw on the digital industries strengths and skills development programmes available in the region such as the WMCA Commonwealth Jobs and Skills Academy or sector skills support programmes such as those provided by Arts Council England (ACE) and regional networks.

The future lies in creating engaging content that will drive awareness and desire - tapping into technologies and formats that allow potential visitors, influencers or trade agents to 'experience' the destination even if they can't visit, the more evocative and experiential the better, utilising VR and AR, film, podcast, live streaming for example. There will be a need for investment here - in content, formats and infrastructure such as destination streaming platforms.

The BATP workstream for content development is a key opportunity here, aligned with the strengths of the region's cultural and heritage institutions, to create exciting destination content - and more imaginatively and purposefully than other UK destinations.

There needs to be an omni-channel approach to sharing and syndicating content - reaching target audiences via the channels they already use and requiring a more open model for content aggregation and sharing to make it easier for visitors to discover, navigate and experience the whole of the region. Delivering the BATP workstream for the DVIN is the critical opportunity here, although it will have limited visible impact for some months.

None of this can be at the expense of good digital housekeeping - in tracking, monitoring and measuring return on investment in order to foster a results-focused culture and skills base, with active digital partner marketing across the region's tourism sector. The BATP workstream for the Integrated Digital Engagement Analytics (IDEA) programme will support this.

These BATP workstreams will accelerate West Midlands' digital capacity and capability in a way in which no other region in the UK is currently doing.



## ACTIONS

- Identify and partner sector skills agencies to develop bespoke training modules for tourism-based industries
- Focus on the delivery of the BATP workstreams to:
  - generate exciting, awareness building and experiential content in a range of formats, capable of repurposing and crossover with domestic and international tourism campaigns, and legacy use
  - build a shared content/listings platform and integrate it with a wide range of channels / campaigns and programmes
  - build bookable product and activate online booking systems
  - monitor and track return on investment, sentiment and segments
  - build analysis, research and insight to underpin future activity
- Build partnerships with regional tech-based innovation businesses, investors and funders to promote opportunities for West Midlands leadership within tourism sector and potential growth streams





# 4. UNDERSTANDING AND PRIORITISING

The fact that the global travel and tourism industry ground to a halt for so long during the pandemic has caused the sector to accelerate, rethink and reframe its approach to reopening, rebuilding and growth.

Even before the crisis, The Organisation for Economic Co-operation and Development (OCED) highlighted the need for policy makers to work with industry and communities to strike a balance between the economic, environmental and social benefits and costs associated with tourism development and implement a long-term and sustainable vision for the future. Travel and Tourism Trade organisations at international and national level are working with the sector to develop and implement policies that focus on value not volume, symbiotic relationships between visitors and host communities, and building stronger local tourism value chains.

The West Midlands aims to become a net zero carbon emissions region by 2040, ten years before the government's 2050 national goal, and the Birmingham 2022 Commonwealth Games aims to be the first carbon neutral Games. The WMCA is leading on the sustainability agenda for the region, although its early priorities have understandably been focused on minimising carbon emissions from manufacturing industries. Birmingham City University's West Midlands National Parks Lab is leading on the development of a natural capital framework programme on behalf of the Local Authority. This will address how best to enhance the region's green and blue infrastructure as credible visitor offers, for example by linking green spaces with waterways to create leisure corridors, and pedestrianisation, planting and outdoor zoning in towns and city centres.



A new Green Industrial Revolution narrative is being developed for the region through the BATP programme and the Local Authority has launched a Sustainability Business Pledge 2024 programme encouraging local businesses to take the pledge to green their businesses and supply chains. And there are plentiful initiatives in progress around clean air zoning and charging, electrification of buses and so on. Sustainability is a top priority for Birmingham Airport which is already working towards becoming a net zero carbon emissions airport by 2033 and is collaborating with airlines to bring newer fleets and in the future, electric fleets.

What could becoming a sustainable/ 'green' tourism destination mean for the region? Currently the vast majority of tourists do not apply sustainability criteria to their travel purchasing decisions, but understanding of the impact of international travel on climate change is becoming better understood. It will take time for visitor behaviour to change and upcoming events such as the UN Climate Change Conference (COP26) in Glasgow in November 2021 and the meeting of all the English mayors in the West Midlands in July could become catalysts for more discussion and communication about the benefits of prioritising sustainable development and green tourism locally.

**A new Green Industrial Revolution narrative is being developed for the region through the BATP programme and the Authority has launched a Sustainability Business Pledge 2024 programme encouraging local businesses to take the pledge to green their businesses and supply chains.**

## ACTIONS

- Invest in a study to determine the environmental impact of tourism in the region with practical recommendations
- Identify existing examples of best practice in sustainable tourism in the region
- Work in partnership with the West Midlands Combined Authority to develop a West Midlands Sustainable Tourism Policy and Priorities
- Work with the industry to identify the most appropriate process for tourism business engagement and commitment, e.g. Sign-up to West Midlands business pledge, Green Tourism Pledge etc
- Set up a 'how to' toolkit (either adapting existing VisitBritain and/or Green Tourism Pledge toolkits or working in partnership with the sector to create a bespoke toolkit)
- Establish a sustainable tourism evaluation framework



# 5. TOURISM FOR ALL

**In the last year the pandemic crisis, #BlackLivesMatter movement and women's safety demonstrations have all shone a spotlight on the continued need for progress towards an inclusive, shared and safe society.**

Like other industries, there is more that the tourism sector can do to better reflect, represent and include the communities it employs and serves. Though a longer-term aim, without addressing the issues and putting in place interventions now, nothing will change for the future.

As a sector, tourism suffers from perceptions of low paid, low skilled, seasonal work and yet for many, working in the industry is often an important first step on the career ladder, a place to learn new customer service skills, and an opportunity for creative entrepreneurialism. Too many of the lowest paid roles in the sector are delivered by women, people from British Black and Asian populations and European migrant seasonal workers (though the latter's numbers are reducing as a result of the UK leaving the EU). As a region with a higher than national average of young people and people of Black and Asian ethnicities, more needs to be done in partnership with schools, Further Education and Higher Education to develop valued tourism career pathways in the region - and opportunities to encourage and partner Creative People and Places programmes in the newly launched ACE funding round could have positive tourism impacts.

**As a sector, tourism suffers from perceptions of low paid, low skilled, seasonal work and yet for many, working in the industry is often an important first step on the career ladder, a place to learn new customer service skills, and an opportunity for creative entrepreneurialism.**

Inclusive tourism is not a new idea, yet too many of our tourism experiences are not fully accessible to visitors with different needs. Inclusive tourism is more than just focused on provision for disabled visitors, it also needs to address fundamental questions about who is included, on what terms and with what significance (Scheyvens & Biddulph 2017). Marginalised people are not just tourism consumers, they can also be tourism producers but only if they can be involved in tourism decision-making.

However, even basic accessibility requirements are not standardised across the sector. As the region gears up to deliver the most inclusive Commonwealth Games to date, this milestone needs to be a rallying call for the tourism sector to reassess what it means to be an inclusive tourist destination and what steps can be put in place. Some of the biggest areas of weakness are a lack of information for visitors, the preoccupation with physical access requirements at the expense of other sensory needs, lack of up-to-date training for customer facing staff in disability awareness and a general lack of opportunity for marginalised people to participate in new tourism product development.

## ACTIONS

- **Champion stories and people within tourism narratives and campaigns that truly reflect the youth and diversity of the region**
- **Identify Accessibility Champions and Ambassadors in hospitality, travel, tourism, heritage and culture across the region**
- **Agree basic inclusive tourism standards with the sector, set benchmarks and goals, and champion best practice examples of inclusive tourism**
- **Work in partnership with the education sector to review and develop appropriate training programmes for tourism skills development**
- **In supporting the sector to create new products and services, ensure that representatives from marginalised communities are involved in the process**



## 6. BUSINESS TOURISM RECOVERY AND GROWTH

**As the 2019 strategy identified, business tourism is a key characteristic of the region's tourism industry, representing 29% of domestic visitors and 34% of the domestic spend, and 60% of inbound visitors to Birmingham alone, all of which has inevitably been badly affected by the pandemic with significant knock-on impact.**

Whilst the events and conference industries are showing some signs of green shoots, the impact won't be felt for some time and return will be differently sized. There is also fear of recession further adding to instability and uncertainty in the market.

On-the-ground feedback suggests that bigger corporate clients and trade events will return more quickly than major conferences, driven by an expressed demand for face-to-face meeting. Autumn 2022 is the earliest for any significant levels of business tourism activity, and a return to more normal levels isn't expected until 2023 or 2024, with some suggesting that the industry will never return to where it was. According to a McKinsey & Company 2020 report, business travel will return in phases, spurred by proximity, reason for travel and sector. The report predicts that Europe, and in particular the UK, has a lower proportion of 'early rebounders' than other global regions.

However, whilst the industry adjusts to the implications of a substantially reduced market and on-going demand for hybrid events, there is a real race to market right now - with UK business tourism destinations in fierce competition. During the research for the 2019-2029 strategy, there were some calls from the business tourism sector for WMGC/CA to establish a convention-bureau type approach and it is certainly the case that the industry needs to work strategically together like never before if it is to compete successfully against other destinations like London, Manchester, Glasgow and Liverpool.

Now is the time to be communicating the collective business tourism strengths of the region and its foregrounding as a hero theme - the established reputation and major brands like National Exhibition Centre (NEC), International Convention Centre (ICC), Vox Conference Venue and Coventry Building Society Arena; a range of venues with capacity for socially distanced meetings; inhouse capabilities to delivery of fully produced, live-streamed events; location and ease of access for the whole of the UK, by rail and road with reduced requirement for overnight stay (although an exciting mix of accommodation and hospitality options if required), and proximity to airports locally as well as Manchester and London.

'Meet-Local' is a growing international business tourism initiative to be applied to the West Midlands. The 'reopening' of Birmingham city centre after a number of years of developments is one of the good news stories to drive a joined-up approach to positioning, along with establishing clear connections to the region's industrial strategy, universities and knowledge economy - and wider opportunities for leisure tourism on the back of events.

Whilst links with Birmingham Airport are less immediately important for business tourism, promoting Birmingham and the region as a viable destination for international events is a targeted outcome for the Commonwealth Games and legacy.

### ACTIONS

- **Establish a business tourism task force to communicate as a region, offering convention bureau type support and assets in order to compete and bid for major domestic and UK events and deliver rapid response to changing demand in the market (conference venues, accommodation, transport, industry, DMOs and WMGC) including:**
  - **Drawing on and communicating the West Midlands brand messages - and applying them flexibly to key business tourism destinations (principally Birmingham and Coventry)**
  - **Investment in monitoring the market and building proactive sales and bidding teams for future events**
  - **Giving consideration to establishing subvention and incentive schemes with key partners**
  - **Adopting 'Meet-Local' messages and packages**
  - **Develop shared content and assets - fact sheets and toolkits**
  - **Leisure tourism packages and offers for attendees**

**Now is the time to be communicating the collective business tourism strengths of the region and its foregrounding as a hero theme.**



# 7. HARNESSING WITHIN REGION AND INBOUND DOMESTIC TOURISM

West Midlands Growth Company projects that the tourism sector will not recover to pre-COVID levels of 133.9m annual visits and £13.1bn annual visitor spend until 2024, but the Commonwealth Games will contribute an extra 10% to the economy in 2022 in both value and volume terms.

From a tourism perspective, the West Midlands is not perceived as a leisure tourism destination. However, it does include nationally known tourism (e.g. Warwick Castle, Cadbury World) and place brands (e.g. Stratford, Birmingham) and is one of the most accessible regions in England due to its location and public transport routes. What is lacking is 'joined up' offers for domestic tourism markets that inspire, excite and will convert into visits.

2021 also provides an opportunity to encourage locals within the region to rediscover more than what's on their doorstep as the country eases out of lockdown measures. Bringing to life stories and places through compelling narratives, digital content and targeted campaigns directed towards families, overnight stays and the VFR markets, will position the region as a new place to explore, share experiences and create new positive memories.

Using some of the outstanding tourism brands and importantly highlighting the unique, though not as well-known attractions set in outdoor locations, e.g. Compton Verney, Kenilworth Castle, centrally within domestic leisure campaigns will raise the profile of the area and encourage first-time visitors as well as repeat visitors.

**Now is the time to be communicating the collective business tourism strengths of the region and its foregrounding as a hero theme.**



## ACTIONS

- Fast track the content creation process and recruitment of marketing resources for the BATH programme to support campaign asset development for domestic leisure campaigns, repurpose content for PR activities and feed into VisitBritain, VisitEngland campaigns
- Work in partnership to build local stakeholder buy-in to tourism campaigns including toolkits for participation
- Agree messaging framework for tourism campaigns that covers essential COVID-secure, 'We're Good to Go' essential messages, and encourages visitors to explore local and revisit favourite places, try off the beaten track experiences, get away from the crowds, book in advance and discover new favourites - to ensure consistency amongst partners, all underpinned by sustainability e.g. ease of travel by train
- Launch an integrated (e.g. outdoor, digital) domestic leisure campaign with commercial partners to promote the region to locals and domestic tourists including VFR (prioritising surrounding areas and London) highlighting the summer season tourism offer with suggested itineraries that cover arts and heritage, food and drink, festivals and events, sport and retail, and reference the identified hero themes including: Birmingham, Shakespeare, Designer Maker, Peaky Blinders, and particularly showcasing the outdoors offer through Waterways and Gardens
- Where appropriate, support Commonwealth Games campaigns for milestone dates (e.g. tickets on sale) with destination messaging
- Ensure that the evaluation framework for the BATH programme is in place early to evaluate the domestic leisure tourism campaigns, and work in partnership with regional stakeholders to extend its budget, reach and impact



## 8. GROWING DEMAND FOR INBOUND INTERNATIONAL LEISURE TOURISM

Since the 2019-2029 Tourism Strategy was first published and as the plans for Commonwealth Games, and the Cultural Festival have progressed, the importance of establishing a presence at international events has become more developed and resources have been secured.

BATP workstreams anticipate regional cultural tourism presence at international events where there is an intended UK/Great Britain/WM presence, including Dubai Expo, Queen's Baton Relay and travel trade events. The intent is to support a range of VIP, business and tourism trade events with a mix of cultural programme, artist Q&A and ambassador activity - supported by marketing assets and digital campaign activity with full tracking and monitoring.

Continuing uncertainties re the status of such events requires flexibility, and there are key milestones in the programme risk assessments when decisions to shift from in-person attendance to virtual/pre-recorded sessions need to be made. Consequently, every event needs to be scoped for a range of delivery scenarios.

Meanwhile, commissioning marketing content, such as broadcast quality film, video and audio footage for use in multiple channels and formats can still be commissioned to plan as it will be required for multiple purposes - including as infill destination content for Commonwealth Games broadcast TV and radio coverage in summer 2022. That content needs to deliver to the region's brand narrative and reflect its diversity including the mix of offer, place identity, demographic - with a particular emphasis on ethnicity and young people.

The opportunity to identify and train new talent in media presentation and production, especially from under-represented sectors of the community is significant - delivery partners need to be identified quickly and content-commissioning contracts need to include criteria and targets. Scoping a calendar of events and locations, recruiting and training media ambassadors, and capturing content needs to begin at the earliest opportunity, taking in Coventry UK City of Culture, festival commissioning and trailblazers, and the stories, institutions, key events and activities happening across the whole region from this summer.

The WMGC Tourism team will deliver the BATP programmes, commission the content and plan profiling and marketing at major events in partnership with the Commonwealth Games Organising Committee, Cultural Festival and VisitBritain. One of the challenges will be to ensure that the primary focus remains on the regional profiling opportunity and avoids focusing too exclusively on promoting the Games and Festival.

### ACTIONS

- Monitor the international events programme and pandemic status
- Work closely with Great Britain/regional partners, Commonwealth Games Organising Committee, Festival of Culture and Visit Britain on international event planning, with clear alternative scenario options and cut-off dates
- Plan and deliver coordinated on-territory marketing campaigns, with monitoring, tracking and reporting
- Recruit and commission content provision (film, audio, photography, copy) for use in multiple formats
- Deliver 'media ambassador' recruitment and training programmes



# 9. ADVOCATING WITH AND FOR OUR TOURISM SECTOR

**What the pandemic crisis has shown is that as a sector, the tourism industry does not have the widespread recognition and acknowledgement at a national level of its economic and social significance to the UK, in comparison to other industries.**

Advocacy at a regional and national level for the sector will continue to be of major importance as the sector works hard to rebuild over the next few years.

The WMGC will continue to lobby government departments, national and international trade bodies, and other regional decision-makers for support and investment in the region's tourism sector, backed by evidence-based insight. As national focus moves away from sector-specific needs to place-based investment, the region is well placed to capitalise on new funding initiatives, such as the Levelling Up Fund, though they will be focused at a local authority level.

Understanding how and where the visitor economy fits within these place-based interventions and how local development reinforces regional place narratives will need to be assessed on a place-by-place basis. Many of these funds will be focused on high streets, retail, local job creation and culture and heritage-led place-making initiatives targeting local communities, rather than visitors, but better places to live, work and invest will become better places to visit too, whether for a day trip, overnight leisure stay or as part of a business trip.

The WMGC will continue to advocate for the delivery of a strategic tourism role for the region as part of the Government's DMO review, working closely with public and private sector partners to support the industry for the long-term. The WMGC should continue its advocacy role with VisitBritain and government departments and work in partnership at a regional level to deliver research insight, tourism skills development programmes, and international marketing. Strong local regional destinations will continue to prioritise domestic tourism marketing.



## ACTIONS

- Develop a robust research and evaluation framework with partners for the BATP and share learnings with the sector
- Champion tourism success stories within tourism messaging to industry, funders and decision-makers
- Work in partnership with public and private sector partners to advocate for the tourism industry in the region, backed by evidence and insight
- Signpost support services for the tourism sector
- Work in partnership regionally to maximise tourism opportunities for post Commonwealth Games legacy



# SUMMARY

This short action plan sets out a mandate to prioritise and deliver practical initiatives to give purpose and focus to the WMGC and its tourism partners during a period of significant global flux and uncertainty.

Whilst important big picture discussions about tourism take place at an international and national level, the West Midlands needs more than ever to seize the advantage of its major events as an opportunity to reposition the region to international and domestic tourism markets, and to use its hero assets as a mechanism to shine a spotlight into parts of the region which may be lesser known, but which contribute significantly to developing a region-wide tourism proposition of scale and substance.

Other regions across the UK do not have this advantage, nor the additional resources which can help galvanise sector partners in a proactive short-term recovery programme which is also fixed on strategic long-term priorities and purpose.

At a time of 'crisis', the mandate for enabling the WMGC's Tourism team to stick to the long-term plan couldn't be clearer, and with so much groundwork already in place, the action plan gives WMGC and its partners a clear steer where to focus resources on the short-medium recovery, but which remains headed in a truly transformational direction.

**The ultimate measure of success will be that regardless of any continued pandemic interruption to delivery plans, that Coventry City of Culture 2021 and Birmingham 2022 Commonwealth Games deliver transformational change for the region as a whole.**



With thanks to the following people for their attention and insight during a difficult time for the tourism sector.

## Directed by the West Midlands Tourism Board 'Tourism Recovery Plan' Task and Finish

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- Chair - Kelly Haslehurst, NEC Group
- Helen Peters, Shakespeare's England
- Sally Ievers, University College Birmingham
- Fiona Allan, Birmingham Hippodrome
- Roger Mendonca, WMGC
- Becky Frall, WMGC
- Shannon Chu, WMGC

### Consultees

- Nick Blofeld, Warwick Castle
- Cllr Patrick Harley, (Dudley) regional Local Authority Tourism and Culture lead
- Lindsey Flynn, Black Country Local Enterprise Partnership (LEP)
- Laura McMillan, Coventry City of Culture Trust
- Michael Holland, Commonwealth Games Organising Committee
- Sam Watson, Selfridges
- Andrew Lovett, Black Country Living Museum
- John Angus, Park Regis / Switch Management
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- Crissie Rushton, Wolverhampton City Council
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- Andrea Fox, Shropshire Council
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- Ed Cox, WMCA
- Indi Deol, Raidene Carter, Andrew Lovett and Members of the Cultural Leadership Board
- Members of the WMCA Cultural Officers' Group
- Members of the Coventry & Warwickshire LEP Culture and Tourism Group
- David Furmage, Greater Birmingham and Solihull LEP
- WMCA Strategic Economic Development Board - for discussion
- WMGC Board - for approval



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