

Place Making and Innovation Executive Advisory Board Report

Author – Diana Roberts – Marketing & Tourism Development Manager

Tourism

Background to the sector and current performance

Guildford performs well, attracting tourists from UK, Europe and the World to visit friends and relatives (VFR), do business and attend conferences (MICE Meetings, Incentives, Conferences and Events) to work on short term contracts and be educated.

In the past 7 years, Guildford has shown a small increase each year in both footfall and annual spend – often against declines in the rest of the South East of England, or England as a whole. When visitor figures decline, like in 2017, Guildford's results are in-line with declining figures across England.

Around 0.35 million overnight tourism trips were made to Guildford in 2017 (equivalent to that of 2016). Of these trips, domestic visitors made 70% of trips (245,000) and overseas visitors made up 30% of trips (106,500). Compared to 2016, the volume of domestic overnight trips decreased by 1% and the volume of inbound overnight trips rose by 3%.

The total number of nights spent in Guildford by domestic visitors in 2017 decreased by 4% compared to 2016. However, there was an increase in the trip length of overseas visitors where the number of nights spent in Guildford rose by 11%. This gave an overall increase in the number of nights spent in Guildford of 3% (1.42 million bednights compared with 1.38 million bednights in 2016).

In total, it is estimated that around £93.2 million was spent by all overnight visitors on their trip to Guildford in 2017, a fall of 2%. Domestic visitor expenditure decreased by 12% and overseas visitor expenditure increased by 7%.

It is estimated that around 4.8 million tourism day trips were made to Guildford in 2017 – this shows a slight decrease of 2% but the previous year it increased by 22%. Day visits were down 3% nationally.

Drawing together direct business turnover, supplier and income induced expenditure, and the additional expenditure spent on second homes and by friends and relatives, the total value of tourism activity in Guildford in 2017 is estimated to have been around £307.5 million, down by 9% compared to 2016. Spend in England remained stable, but there was a decrease of 13% in the South East, so Guildford performed better than our neighbours.

This income to the local economy is estimated to have supported 4,158 Full-Time Equivalent Jobs. Many of these jobs are part-time or seasonal in nature and translate into an estimated 5,679 Actual Jobs, a decrease of 8% compared to 2016.

Guildford continues to be a hub for business tourism, with its close proximity to London and the main airports at Heathrow and Gatwick – it is a popular and convenient meeting place for local and global companies. Some of the above footfall and bed nights will be down to business tourism. In 2017, there were estimated 11.7k business events at Guildford and Surrey venues. These events generated an estimated 595k delegates accounting for 1,007k event days.

Overall direct spend from delegates (and partners) on venues and in destination on a range of things, including accommodation (for those not staying at their venue), food and drink, shopping, entertainment, and transport in the area was an estimated £129.4m. Residential / 24-hour delegate rates in Guildford and Surrey, at £173, were significantly above the national average (£134). Day rates, at £42, were also above the national average (£37).

Notes on Summary

SWOT

Strengths

- Proximity to London
- Existing and pro-active network -
- Strong local partnerships
- Wide range of 'product'

Weaknesses:

- Staffing: students and EU workers
- Proximity to London
- Shortage of Hotel Beds
- Lack of funding (Discover England Fund)

Opportunities:

- £ vs other currencies in short term
- UK Inbound – other areas Brazil, India, Australia/New Zealand
- Potential to work effectively with the Heritage Team and the Museum Re-development

Threats

- Brexit
- Lack of joined up approach from other Borough's
- Larger DMO's – greater spending power inside and outside of UK

Guildford and the surrounding areas are marketed to the following target groups.

Meetings, Incentives, Conferences and Events (MICE)

The tourism team is directly responsible for the Conference and Venues Group where members pay £430 per annum and receive a listing in the Venues brochure; a full entry on the website in the Venues section; press leads; opportunities to join in pro-active marketing initiatives such as exhibitions and Familiarisation visits at additional cost. They meet twice a year plus the Tourism Conference in order to share best practice, and discuss promotional opportunities.

This target group can be approached digitally using social media and emails and therefore only 1000 brochures are printed for use at exhibitions and in the Tourist Office.

We are members of Tourism South East's Meet Beyond London campaign and our Venues information from our website also features on the [Meet Beyond London website](#).

Groups

Group day visits and short breaks – these groups mostly travel by coach but there is a growing number of special interest groups and retirement groups from London who travel by train. They receive group rates from attractions and venues.

Group rate information is included in the annual Visit Guildford Destination Guide, and specifically coach parking information. There is a dedicated [Groups section](#) on the Visit Guildford website which attempts to answer FAQ's of group organisers including parking, food and drink stops, group friendly hotels and offers.

We attend Excursions Exhibition (largest one day groups exhibition in UK) every January with other tourism partners. Every other year we have organised a familiarisation visit for group travel through Steve Reed Tourism, inviting tour operators, coach operators and travel wholesalers to a mini tour of the area to get a taste of the attractions and accommodation we offer. The last one took place in October 2018 and already we can identify about £100k in booked business with our partners as a direct result – eventually we expect this to double as they are slow in reporting back, and often cannot identify the sources of their leads.

Visiting Friends and Relatives (VFR)

This is a large market, but often visitors will stay with relatives rather than in paid

accommodation, but will account for lots of the reported footfall in local attractions, as residents do tend to explore their local area more when they have visiting friends and relatives.

This category also includes some UK Inbound visitors by virtue of the Research Park, the Hospital and the University as many employees or students are visited by friends and family during their stay in Guildford.

The Visit Guildford website is the main vehicle for getting the message out about places to visit, with themed pages targeting certain groups such as 'Dog Friendly' ; 'Picnic Spots' ; 'Tours and Walks' and seasonal pages. This group is targeted through social media, local magazine listings and radio coverage of events.

Free Independent Travellers (FIT) UK

This group is the hardest to target so we use the website, social media, and advertisements in Group Travel publications to give national coverage (recipients of the publications show a propensity to travel in small groups as well as by organised coach trips)

UK Inbound

Through Tourism South East's International Marketing campaigns we target:

- **Western Europe:** France, Germany, Holland and Belgium. TSE translates information and take this on sales missions in France and Holland, sending us leads from press and travel trade.
- **Nordics/Scandinavia:** TSE goes on sales missions to Sweden and Norway and sends us leads to follow up from travel trade and sometimes travel press.
- **China:** Through the Go China campaign we have a presence on a website hosted in China and we are represented in a travel trade brochure in Mandarin. TSE attend travel trade sales exhibition in Shanghai and Beijing, forwarding the leads for follow up. We make regular updates on Guildford on Weibo and WeChat – Chinese social media.
In addition to the TSE activity, we also have a Guildford presence in Mandarin on an App used by students at University of Surrey, have Mandarin speaking Guildford Ambassadors who organise visits for fellow students, and a leaflet in Mandarin which includes tourism, education and business.
- **USA/Canada** TSE stopped marketing to USA a couple of years ago so we now work with Custom GB who sends out e-newsletters to over 10,000 USA Travel Agents every 2 weeks.

The Tourist Information Centre

- Guildford has the only Tourist Information Centre in the South East, which has won awards regularly in the Beautiful South Awards.

- The Tourist Information Centre is open 6 days a week in the winter and 6 days a week in the summer and offers advice and help to both residents with visiting friends and family and visitors to the town.
- The primary objective is to get people to come to the town, stay longer and spend more.
- They sell souvenirs, maps and books as well as tickets to local events and attractions which provides additional income to GBC.
- The ticketing service also offers marketing, help and advice to promoters to help them maximise the effectiveness and profitability of their events.
- The TIC Team also engages with local businesses and works closely with the University of Surrey and attends Freshers Fairs and Open Days to promote the town to prospective and new students.

Marketing Collateral

In order to get the message across that Guildford/Surrey is a great place to visit for leisure or work we are directly responsible for producing and organising the following:

- www.visitguildford.com - over 230k views in last 12 months
- The Tourist Information Centre – the only one in Surrey
- Visit Guildford Destination Guide (annual publication)
- Visit Guildford Business – Venues Guide (annual publication)
- Visit Guildford – European leaflet in English, French, German, Dutch, Spanish and Italian – distributed on P&O Ferries.
- Visit Guildford leaflet in Mandarin
- Guildford Summer Festival brochure (June to August)
- Town Guides Free Walks – (May to September)
- Town Guides booked walks for groups
- Social Media:
 - Twitter over 12,200
 - Facebook over 4000
 - Instagram over 2100
- Press and PR
- Exhibitions: Excursions, Surrey County Show, Surrey Business Expo
- Amazon Alexa Daily Flash Briefing: What's On in Guildford
- Video – themed short videos used on website and social media

Key Drivers

- Partnership working
- Social Media – dialogue not monologue
- Repetition and reliability
- Proactive
- Awareness of trends
- Tourist Information Centre – people like dealing with people

Key Industry Partners

- Tourism South East
- Meet Beyond London
- Visit Britain/Visit England
- British Destinations
- Tourism Alliance
- UK Inbound
- Tourism Businesses
- Custom GB
- Visit Surrey
- Travel Sea and UK-China Education

The Future

- Brexit will upset the tourism landscape – lack of European nationals working in UK and exchange rates as well as reputation.
- Keep up to date with trends
 - Multi generational groups (families)
- Use VB profile research to target new UK Inbound markets and keep up to date with changes in existing ones.
- UK Inbound – this is a UK Export bringing in new funds
- Explore new markets; ie Brazil, India

Attachments:

- Cambridge Economic Impact Report for 2017
- UKCams Study for 2017