



## Place quality: creating distinctive destinations

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Tourism in historic towns – a quality offer  
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## Background

- Do we have, or get the quality of place we deserve?
- Or that we need, given the increasingly competitive tourism environment in which we operate?
  - The UK is no. 6 in the world in attracting inbound visitors
  - And no. 2 in the world in generating outbound visitors
- I would argue that we don't...
- But if we don't, why don't we?



## Why Does this Concern the NWDA?

- The Agency believes that tourism and the visitor economy are important to the overall economy
- The concept of the visitor economy is one that we take a particular interest in
  - Tourism is about people – it is a person centred concept; you can be a tourist in one context, but be doing the same things and buying the same goods in another context and not be a tourist
  - The visitor economy is about place – it is a place centred concept; I sometimes use the analogy of a coral reef



## Why is this Important to the Region?

- Over 50% of all tourism expenditure is by same day tourists; there are more than 200 million such visits to the region each year
- That is around £5 billion per year in the Northwest
- This supports close to 200,000 jobs
- Perhaps surprisingly, only 61% of the tourism day visits to the region are made by people from the region
- 29% of domestic overnight visits to the region are by people who live here



## Successful Places

- We want to generate more value from tourism; that means more expenditure, and probably, more tourists
- Destinations drive visits, by tourists and by everyone else – we need to attract more day and overnight visitors, keep the visitors we have now, and provide them with experiences they value
- Successful destinations are likely to be successful places for other sections of the economy too; this is an agenda that is of increasing importance to us all



## Day Visitors

- Day visitors are making discretionary trips; choosing to spend money and time in a particular way, when there are many other alternatives
- I focus on day visitors because their number and spending patterns support the destinations, the attractions, and the businesses that enable us to succeed in attracting domestic and international overnight visitors



## Back to the question of why...

- Why aren't our towns and cities better places, and better destinations?
- My focus is on the public (and semi-public) realm, and more broadly on the conditions for growth...
- Some suggested reasons:
  - A lack of competitive awareness
  - A lack of knowledge about a) which consumers we appeal to, and b) why, c) what they think of the experiences we provide, d) who doesn't come, e) who we want and f) how we might attract them...



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## Back to the question of why...

- Some more suggested reasons:
  - Poor design, poor design standards, a lack of conviction about the importance of design, the lack of a design language, inexperience in dealing with (and getting the best from) private sector developers...
  - Low quality or lack of management of place
  - Little or no animation of place
  - Issues of leadership and of coordination and cross departmental teamwork
  - A tactical, rather than a strategically driven approach
  - Not enough partnership with the private sector



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## Responding to this Analysis

- We aim to increase competitive awareness; formalised in a way that enables meaningful targets for improvement and investment to be set
- Linked to knowledge of what consumers are seeking; based on the better knowledge of visitors generated through the use of segmentation models and research
- With these being used to inform decisions on the retail, cultural and other experiential components that drive consumer choice



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## Competitive Awareness

- I like to use the analogy of football leagues...
  - So, who is your town or city competing with (what league it town play in)?
  - Who do you need to beat, or be as good as, if you want to succeed?
  - What league do you want to be in five years from now?
  - Where do you look to for inspiration?
  - Who do you aspire to be as good as?



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## Competitive Awareness and Place Comparison

- We have commissioned Experian and Locum to develop and test a place comparison methodology
  - This will identify a range of factors (quantitative and qualitative) that influence consumer's choice of destinations
  - Some of these factors will also help us to choose comparators for the places we are working with
  - From this we will seek to create a model, that will generate scores for a set of destination attributes
  - We will use the model to compare specific places with comparators both in the UK and in Europe



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## Raising the Quality of Intent...

- We will produce analytical reports combining:
- Information about existing and potential visitors and the appeal of the pilot area to these
  - We already have a good deal of insight into this area, but will commission more research where necessary
- The information arising from the place comparison work, drawing specific lessons and examples from each of the 3 or 4 comparators



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## Raising the Quality of Intent...

- Reports are intended to achieve two things;
- To provide clear, structured evidence (both quantitative and qualitative) of the need for, and nature of, investment in place that will help convince politicians, and;
- To give a framework for, and guide decisions on, the nature of and priorities for such investment



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## The Core Approach

- The aim is to:
  - Establish a common vision of the type of customer that the neighbourhood is trying to attract and the character of the activity it wishes to develop in order to attract them
  - Establish a 'brand' for the neighbourhood and take actions to create a sense of place linked to this
  - Develop a partnership of like-minded stakeholders within the neighbourhood that can take forward the vision
  - Develop a plan to improve the neighbourhood as a destination
  - Identify and promote anchor developments that will attract people



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## Developing the Framework

- A1: A long-list of factors that influence people in the choice of a destination
- A1: Examples of good practice
- A2: A matrix that combines the long-list into a short-list of factors and associated measures
- A3: Methodology for scoring the indices, with an assessment of the confidence level



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## Developing the Framework

- A4: A typology for different types of neighbourhood; a framework for comparing cities, towns and neighbourhoods, with suggestions as to what the benchmarks could be
- A5: Workshop with tourist boards and other tourism professionals to discuss outputs from A1-A4



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## Developing the Framework

- B1: Application of the methodology to a test destination
- B2: Workshop with tourist boards and other tourism professionals to consider the experience of Locum in applying the methodology
- B3 Application of the methodology to the other 7 trial areas
- ...



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## The Pilots

- Part of Ropewalks, Liverpool
  - The best opportunity to encourage the development of a 'Bohemian' quarter
- Liverpool Waterfront
  - The waterfront is a 'signature project' and at the heart of the regional park
- Cathedral Quarter, Chester
  - The region's primary 'heritage' city and the Cathedral is central to the city's identity



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## The Pilots

- Cathedral Quarter, Carlisle
  - Other than Chester the only other city in the region with a distinctly medieval feel; Derby an interesting comparator
- Lake Windermere Waterfronts
  - A series of key touch points that are signifiers of the quality of the wider Lake District tourism experience
- The Oxford Road Corridor, Manchester
  - A linear cluster of cultural institutions; Museum Mile in Bonn a potential comparator



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## The Pilots

- Lancaster
  - A townscape of 18<sup>th</sup> Century Georgian character, but which does not currently exploit its heritage assets well
- St Annes on Sea
  - A 'gem' that has seen real progress from the nadir of a few years ago, with the aspiration to be a classic resort



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## Where are we now?

- 12 broad attribute categories for factors that influence destination choice
  - Access; Accommodation; Attractions; Built and Natural Environment; Conference & Exhibition Facilities; Entertainment and Performing Arts; Events; Food; Nightlife; Physical Activity (participation); Retail; Visitor Services
- Sub-categories for each of these
  - For example, for Access: Rail, Coach, Road, Air; Cruise; Ferry



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## Where are we now?

- 257 quantifiable factors in total across the range of categories
  - For example, for Rail Access: % of top 10 UK cities (within 200 miles) with direct service; Speed of journey to top 10 cities (within 200 miles); Frequency of service to top 10 cities (within 200 miles); Left luggage service at station; Manned visitor information at station; Hotel bookings service at station; Car hire at or adjacent to station; Quality of architecture of mainline station(s); Cleanliness and maintenance of the mainline station(s); Quality of services to nearby tourist attractions (within 25 miles); Quality of visitor information points at station(s)



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## Where are we now?

- An emerging typology of place matrix, linking the retail, entertainment and leisure offer to the Ark Leisure consumer segments
  - From Corporate to Independent in one dimension, and from Value to Premium in the second
- A strong focus on neighbourhoods and the importance of a 'mosaic' approach
- The importance of qualitative judgements and of illustrations



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## Where are we now?

- We have initial reports for two of the pilots, which have applied the place typology and mosaic thinking
- We are about to pilot the comparison methodology
- Some initial work on a guidance manual that will complement the place specific lessons coming out of the pilot analysis
- An acceptance of the need to recognise complexity, while striving to identify strategically important learning points



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## Where are we now?

- On the early stages of a fascinating, and hopefully fruitful journey...



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## Final Thoughts

- Monocle, issue 05 . volume 01 . July 2007
  - City slickers; Top 25 urban design
  - It's not necessarily the billion-Euro development, star-architect-designed gallery or shiny new Ferris wheel that makes locals feel good about their town. Monocle believes that the measure of a city is more about everyday wonders - pavements, well-designed schools, punctual transport - rather than one-off, grand projects...
    - Street clocks, Prague
    - Street seating, Barcelona
    - Bike lockers, Chicago
    - Trams, various cities
    - Signage, Berlin
    - Public Loos, Tokyo



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