



Review of Test Valley Tourism



Blue Chip Tourism/RJS Associates Ltd
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1 Introduction

1.1 Aims and Objectives

Blue Chip Tourism and RJS Associates Ltd were appointed in November 2019 to conduct a review of the Test Valley Tourism and Visitor Information Centre (VIC) service. The purpose of this study is to review the existing TVBC borough-wide tourism service and “identify a best practice model” to attract visitors, support and promote the visitor economy and deliver a borough-wide local authority tourism service.”

Objectives: The objectives agreed at the initiation meeting with TVBC were to ensure:

- That the model reflects the changing nature of tourism including amongst other things, the on-line offer;
- That comparisons include local authority funded operations, and similar places to Test Valley including the CIPFA local authority ‘[nearest neighbours](#)’ grouping;
- That the service provision identified, fits within the current TVBC budget contribution of £70k per annum;
- That the service provision identified at least matches the current level of service, as delivered by the current provider;
- That ‘best practice models’ demonstrate a proactive approach to visitor information service provision.

1.2 Context

Test Valley Borough Council (TVBC) has a multi-annual agreement with Tourism South East (TSE). This agreement, which includes TSE’s management of the Romsey Visitor Centre (VIC) on behalf of TVBC, runs to April 2021. Whilst the VIC is located in Romsey, and is referred to as the Romsey VIC throughout this report (for simplicity), it provides services on behalf of the whole of the borough and which benefit the wider area.

The timing of this review allows the council sufficient time to make any significant decisions on that agreement. A supplementary context is the Council’s work to support town centres of Andover, Romsey & Stockbridge. This includes working with various groups, such as the Romsey Future Workstream which has included setting up www.visitromsey.org plus a Romsey Heritage Trail.

The VIC delivers a number of services on behalf of the council including:

- Over the counter and phone information on Test Valley
- Business liaison and networking including 2 formal meetings a year
- Familiarisation Trips
- Tourist Information Point Management x 9 across the borough
- Social Media account management
- Group Travel/Meet & Greet Service in Romsey
- Open Days x 2 per year
- Theatre Ticket Sales for local venues.

The Council wishes to take advantage of the opportunity offered by the 2020/21 VIC contract renewal with TSE to consider its options and decide on a way forward with sufficient time (1 year) to manage any significant change. There were no major pressures on service delivery or plans for budget cuts.

Whilst the VIC accounts for the bulk of the budget investment and the majority of this review, TVBC also wished to review how it operates its entire tourism service and the relationships it has with its delivery partners.

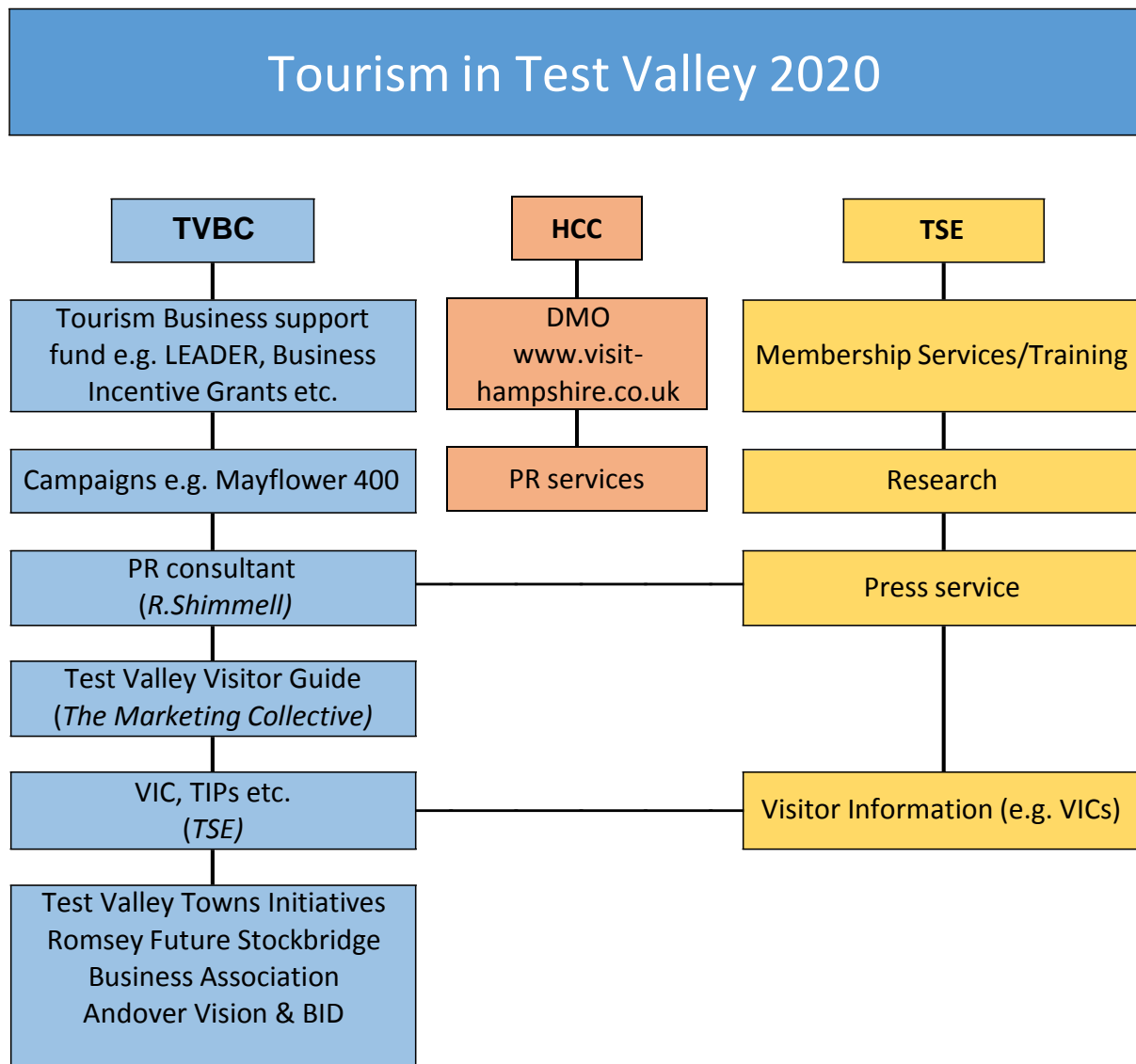
1.3 Current Situation

The responsibility for managing and developing tourism lies within the role of the Economic Development Service of TVBC. It is only part of the responsibilities of the Economic Development Officer. Given this level of resource, TVBC has adopted an innovative and successful commissioning model. It retains a strategic responsibility, undertakes specific projects including product-based literature (e.g. Vineyards, Food & Drink, literary links, Town guides), and delivers the LEADER programme but works with a range of partners. Partner responsibilities include:

- **Hampshire County Council/Visit Hampshire.** They manage the Test Valley pages on the visit Hampshire website, and undertake PR and campaign coordination at a county and product level e.g. Mayflower 400. The website pages were funded initially by a one-off capital sum from TVBC, but management is now provided free of charge. The county council also promotes outdoor recreation including the Test Way long distance footpath.
- **The Marketing Collective.** TVBC has an annual agreement, which has lasted more than 5 years, with this private agency to produce and distribute the Visitor Guide publication for staying visitors. 30,000 copies of the visitor guide are distributed (with 20,000 through Brochure Connect) to potential visitors within a 2.5 hour drive time of Test Valley. The publication has grown in size during the period and is considered a success by both TVBC and the agency, with additional advertisers and commercial support providing the evidence. Since 2018, this has been augmented by the Pocket Guide for day visitors (print run 20,000) and agreement has been reached for the Marketing Collective to deliver new social media accounts on behalf of Test Valley from April 2020. TVBC invests approximately £3,000 per year in this activity.
- **Rachel Shimmell PR.** TVBC contracts with Rachel Shimmell PR to deliver a pro-active strategy for gaining coverage of Test Valley in national and specialist publications and online (including blogger content). Rachel Shimmell PR also deliver the public and media relations (including maximising re-active opportunities) which TVBC does not have the capacity to deliver.
- **Tourism South East.** In addition to the agreement for the delivery of VIC and business liaison services (see above), TVBC works with TSE on media opportunities and research (paid). TVBC is a member of TSE. TSE also provides membership services to businesses in the Test Valley area.



The diagram below summarises this model.



1.4 Methodology and approach

The methodology used in this review is summarised in the table below:

Component	Details	Purpose
LOCAL		
Historical Analysis	Desk review of information supplied by TSE	To analyse trends in usage and performance of the VIC service with limited benchmarking against other TSE-operated VICs
Local Industry Survey	Online Survey	To ascertain views on the current service and solicit proposal for new and updated services
'3 Towns' Workshop (x 2)	Held 20 th January 2020 with representatives of Andover, Romsey & Stockbridge plus TVBC reps.	To consider potential market segments for TV and discuss how the council and the 3 towns can

Component	Details	Purpose
		best work together for mutual benefit
Elected Member (plus some private sector) Workshop	Held 20 th February 2020	To gain member/business input and ownership of the review
Review of Previous Work	Desk based review of Romsey Futures consultation with local industry from 2018-19	To gain background knowledge and avoid duplication or repetition of work
'Neighbour' consultation	Structured telephone interviews and meetings with Wiltshire and Winchester	To identify perceptions of Test Valley and opportunities for partnership working
NATIONAL		
Visitor Information Survey	Online survey to list of similar destinations, supplemented by a wider regional distribution by TSE	To benchmark custom and practice and trends in performance and service delivery
Case Studies	Telephone consultation with identified similar destinations	To identify custom and practice and elicit any lessons for TVBC
Meetings and conversations	Rob Griffiths (Paultons Park), Julia West (VIC manager, Jo Andrews (The Marketing Collective), Rachel Shimmell (PR), Teresa O'Kelly TSE.	To gain detailed background information and understand potential future activity

This approach yielded a lot of information (see appendices 1 -4). While there was a great deal of enthusiasm to contribute to the study at a local level, there were challenges. Finding relevant case studies was difficult with national changes in delivery structures or personnel changes. Response levels to the Visitor Information Survey were disappointing and the results from this survey should be seen as indicative, not conclusive, with difficulties in making valid comparisons between different operations.

2 Context

2.1 The National Context

Tourism in England contributes £106 billion to the British economy (GDP) when direct and indirect impacts are taken into account, supporting 2.6 million jobs.

£19.3 billion was spent by British residents on 97.4 million overnight trips in England, equating to 295.8 million nights away from home. 35% of trips are staying with friends and relatives. £53 billion was spent on 1.4 billion domestic tourism day trips.

Tourism sits within various departments across local authorities – most typically as part of Leisure and/or Cultural Services, Planning, or Economic Development. Over the last ten years, some local authorities have withdrawn from proactive tourism activity as a result of budget cuts - though will usually continue to have some impact on infrastructure development via local plans, signposting and planning development policies.

Destination Management Organisations (DMOs) do not have a single definition, but usually they are a public/private partnership, constituted as not-for profit organisations, with local business paying an annual membership and governance provided by an independent board. They take a lead role in managing and developing tourism – usually, but not always along county boundaries.

DMOs typically provide marketing opportunities, training courses, networking events and industry expertise to support local tourism businesses. Their separate constitution enables them to operate more flexibly than local authorities in terms of procurement, employment contracts and decision-making. The majority receive a major contribution from their local authorities. Local examples are Go New Forest DMO and Visit Wiltshire. In some instances, there can be competition between DMOs in neighbouring areas for membership income - and confusion for businesses who are asked for contributions from different organisations.

The vast majority of destinations, however, recognise that visitors are not aware of council boundaries and developed joint initiatives under one umbrella brand – usually around a county name or other strong brand – such as Shakespeare’s Country or the Peak District. In some cases (such as Visit Kent and Enjoy Staffordshire) the Destination Management Organisations have been able to access considerable European funding in recent years.

VisitBritain have recently published a [five year strategy](#) based on five key action areas. The most relevant to Test Valley are the objectives to increase the spread of inbound tourism around the UK (Regional dispersal) and the plans to work with destinations to improve data on performance through the Sector Deal funded national data hub.

One specific item of national activity with local relevance is that, in January 2020, VisitEngland launched a *Peppa Pig* inspired campaign featuring 25 experiences for pre-schoolers and their families, all inspired by the adventures Peppa has in the show. The hub is being promoted across VisitEngland’s digital channels to drive online traffic. A children’s activity sheet and tick list are available to download to help them follow in Peppa’s footsteps. This potentially represents a further opportunity for Paultons Park, home of Peppa Pig World and for nearby tourism businesses. (NB whilst Paultons is located just in New Forest District, it makes a major contribution to both visitor numbers and tourism businesses in Test Valley-there are therefore numerous references to Paultons in this report). Statistics show that the family market represents about a third of the potential domestic tourism market in England. With the pre-school family segment free to travel through the shoulder season, it is hoped that targeting this audience can spread tourism’s economic benefits across more of the year including off-peak.

2.2 Trends in Information Access

The digital advances of the last decade have transformed the way that visitors research, select and book their trips. Online travel agents (such as Booking.com and Hotels.com) have made accommodation bookings quick and easy, while review sites (such as TripAdvisor) give visitors the quality assurance that ‘official approval’ schemes once provided. Smart phones and GPS apps have given visitors a map to every area in their pocket.

These factors, combined with pressures on local authority budgets have led to the closure of many visitor information centres, or their amalgamation into shared premises with other council (e.g. libraries) or visitor-related services (e.g. transport information centres, attractions, museums). Some destinations have developed partnerships with local businesses so that visitor information is provided where the visitors are – be that at points of arrival, cafes or visitor attractions. In many parts of the country VIC’s have simply disappeared with visitors relying solely on information from digital sources or literature found at local distribution points.

There are 42 TICs/VICs in South East England. Many of these are located in a shared service arrangement with a museum/gallery or library. Petersfield TIC for example has a dedicated section within the library in the town square. Some, such as Wallingford, are operated by Town Councils and others are operated by District Councils. The visitor information survey and other consultation for this study identified a number of example locations and shared facilities but also stand-alone VIC's operating successfully.

Similarly, whilst some destinations are no longer producing print in the volumes they once did - and in many cases not at all - our research identified a number where print still forms an important part of the marketing mix and is, indeed, increasing. As with VICs, the market should dictate the provision, with, e.g., a demand for more traditional, non-digital, information from older customer groups.

Some destinations have used the skill set in the visitor information centres to expand their influence into curating the destination story for digital and traditional media, or supporting and engaging with local businesses, or taking on a proactive role in social media for the destination.

Over the counter information remains important in specific destinations for certain markets – older markets plus overseas and first time visitors in particular. Face to face or telephone contact with an informed and helpful member of staff has been proved to enhance the visitor experience and inspire future and repeat visits.

In Romsey the VIC has sought to broaden its offer to service the needs of residents, whilst also using the core service skills of delivering accurate, up to date, information in support of attracting future visitors through web content and social media platforms and engaging with local businesses.

2.3 The Local and Regional context

Test Valley is located at the western edge of Hampshire, between the well known destinations of the New Forest (to the South) and Winchester (to the East). The borough's western border is with Wiltshire, home to Salisbury and Stonehenge.

The River Test itself is one of the most famous fishing rivers in the world, with a global reputation and a crucial role in the history of fly fishing. Whilst access to the Test is controlled and can be expensive, there are locally based tour operators offering packages. The borough is also home to a concentration of high quality attractions, many appealing to both the younger family market and to older visitors.

Relationships with neighbouring destinations are in place through the Hampshire Tourism Officers' Forum and there is evidence of project-based partnership working, including the current Mayflower 400 campaign. There is a strong and effective partnership with Visit Hampshire.

Across the wider region, Tourism South East is one of only two regional tourism organisations still in place in England. Its mission is to provide services and expertise that support the performance and growth of tourism businesses and destinations. It runs region-wide marketing campaigns including group travel programmes. It has particular expertise in providing training services for industry and its research department collates data relating to tourism in the region, including occupancy levels and volume and value measures. It provides an outsourcing service to local authorities – including Test Valley - in the provision of Visitor Information Centres, achieving savings in management resource, economies of scale and shared expertise through the operation of multiple centres.

Tourism is an important part of Test Valley's economy, generating £195m in economic impact (2017) and supporting more than 4,500 jobs (approximately 10% of the borough's employment base). Test Valley generated 2.9m. day trips in 2017 and local businesses are investing heavily to upgrade attractions (such as The Army Flying Museum, Hawk Conservancy, Paultons Park) and in new hospitality and local produce businesses (such as Black Chalk's winery). It is estimated that over the last couple of years and including development currently underway (including Paultons Park) that something of the order of £40m. is being invested in visitor attractions in the borough. There is a particular product strength in independent retail, especially in Stockbridge (home to the Orvis outdoor clothing brand) but also represented by Bradbeers, the independent department store in Romsey.

3 Tourism Delivery in Test Valley

3.1 Overview

As section 1.3 identifies, Test Valley Borough Council has adopted a commissioning based model to its delivery of tourism services with delivery undertaken by a number of organisations. The following sections look at delivery across three broad areas of activity – marketing, visitor information and other services. This analysis draws on the range of information sources and research undertaken as part of this review (see section 1.4).

3.2 Marketing

The marketing of Test Valley is undertaken by a number of organisations including Hampshire County Council website – www.visit-hampshire.co.uk), TSE (social media via the VIC), Rachel Shimmell PR (PR), and the Marketing Collective Ltd. (print & social media).

Key points arising from this review:

- The industry saw marketing as the most important element of service delivery within Test Valley (see appendix 3). However, there was a perception that VIC is the whole of the tourism service with a lack of knowledge of other aspects, including the product specific print work.
- The annual marketing budget is £11k per annum.
- The Test Valley webpages (www.visit-testvalley.org.uk) on the Hampshire County Council site (www.visit-hampshire.co.uk) generate approximately 31,000 unique web users. The cost per unique web user for Test Valley was £0.36 (based on overall marketing spend). The comparable data collected as part of this review, while not comprehensive, suggests that this is a reasonable cost particularly given Test Valley is not necessarily a high profile destination when compared to others (like Portsmouth or Winchester).
- The Test Valley pages on Visit Hampshire (www.visit-hampshire.co.uk) have seen a 35% year on year growth in website usage overall between 2018 & 2019 (although the Test Valley pages only went live in April 2018 so a full year picture might have shown a lower increase) compared to an overall increase of 45% for the site
- There are two social media platforms that are operated by the VIC – Twitter and Facebook.
 - Twitter: 'Romsey Vic' @moreRomsey – 978 followers. The average number of tweets over the last couple of years was approximately 1350 (based on the last two complete years' figures). This has declined since 2017/18 (based on a conscious decision to optimize the reach of each tweet/post-see Appendix 1 for details).

- Facebook: 'Romsey Visitor Information Centre' - 125 likes and 150 followers. There has been a deliberate policy of becoming more selective in the use of Facebook in 2019-20 which has resulted in a drop in activity but a less dramatic downturn in Facebook 'likes'.
- While businesses seemed to be aware of and had benefitted from social media activity (see appendix 3), anecdotal evidence (from the workshop) suggested that that the borough needed to enhance its online presence and its use of social media.
- Test Valley was seen by the industry as an emerging destination brand with strong appeal based on its fishing heritage USP, the countryside walking and cycling opportunities (especially as a day visitor destination) plus its complementarity to Winchester and other neighbouring destinations (for staying visitors).
- There was a slight tension among businesses between Test Valley level branding/marketing and the individual identities of the three principal towns (Andover, Romsey and Stockbridge) with strong voices looking to create specific marketing channels for these towns. For example, Romsey already has its own website and consultation highlighted a question as to Romsey VIC having a Romsey email rather than Test Valley. Perhaps the most pronounced is the 'Andover Anomaly' - a phrase coined at the February workshop. Whilst there are clear product synergies at some nearby attractions (the Hawk Conservancy and Army Flying Museum for the family market-linking with Paultons Park and Mottisfont in the South of the borough), the town is (arguably) culturally/geographically different with different transport links (East-West) and a physical proximity to Wiltshire, especially Stonehenge and Salisbury. Some stakeholders in Andover see benefits in emphasising these linkages to such well known destinations and Wiltshire generally, as opposed to a perceived 'Hampshire' approach.
- Despite this tension, there was a recognition that Test Valley is greater than the sum of its parts and that increasing visitors to the whole area will benefit everyone.

3.3 Information Services

Key points arising from this review include:

- The cost of operating the Romsey VIC is £70,000 per annum. This is delivered through TSE.
- Romsey VIC dealt with 68,704 enquiries in 2018/19 (the last full year data is available for). The majority of these were walk-in enquiries (56,627 – or 82%) with telephone enquiries accounting for a further 6% (Appendix 1 provides more detail on available statistics).
- Visit and enquiry patterns have been variable in the last three years, with an increase in 2018/19. Year to date figures suggest that 2019/20 will not necessarily be such a good year. This can be attributed, in part at least, to a 'spike' in September 2018 (due to high demand for Romsey Show tickets) and capital works (in the town centre and on site) during Summer 2019.
- The average cost per visitor to Romsey was £1.49. The ratio of staff members to visitors was approximately 1: 20,400. Obtaining comparable data was difficult in this study and there are lots of factors that impact on ratios like these (destination popularity, VIC location, overhead costs). However, from our experience and other studies we have undertaken these are reasonable ratios (particularly for a relatively small VIC which does not benefit from the economies of scale or visitor flows of a busier VIC).
- There are nine Tourist Information Points in the Borough which are managed by the VIC team.
- Providing information services was seen by the industry as nearly as important as marketing services. The VIC was well regarded by the industry and there was generally a strong awareness (and use) of the information services it provides. There were some exceptions –

like event pop-up information stands – which the local industry had a lack of awareness of (see appendix 3).

- There was a concern among operators that provision is centred in the south of the borough and there was a limited understanding of the coverage that the rest of the borough is given at the VIC.
- Romsey VIC was providing a range of local services such as the coach meet and greet, the management of familiarisation trips and social media that comparable VICs were not (see appendix 2).
- The presence of the VIC was seen as a good fit with the more mature market that is attracted to Romsey and the rest of the borough. This market also tends to require information in print rather than exclusively relying on digital sources.
- Operators highlighted that the VIC should promote itself better to increase awareness amongst the local population, businesses and visitors, and there was also a view that it should increase its opening hours (a specific point being that the Abbey is busy on a Sunday when the VIC is closed - see appendix 3).
- Different areas are employing different delivery models for their information services. There was no single 'best practice' model identified that Test Valley could necessarily emulate, and delivery models are typically developed to providing the best local solution.

3.4 Other Services

As section 1.21.3 identifies, the tourism service is involved in a wider range of services that customer facing information provision and marketing services (see above). These include:

- Business liaison and networking including 2 formal meetings a year
- Familiarisation trips
- Group travel/meet & greet service in Romsey
- Open Days (2 per year)
- Theatre ticket sales for local venues

These services do not necessarily lend themselves to quantitative analysis in the same way as marketing and information services. However, the review highlighted a number of points:

- There was a clear desire for proactive business support at a Test Valley level, creating specific product clusters and encouraging information sharing. Attendance at the current networking meetings was felt to be strong, with approximately 30 business at each event, reflecting a commitment and interest in this part of the service.
- The VIC service can demonstrate a number of examples of facilitating relationship development between operators that has resulted in joint initiatives (see appendix 1).
- There was a desire from operators for more intelligence. This included research on who the customers are and their demographics, why do people use the VIC and what for. This information was required at both a destination and VIC level.

3.5 Potential Partnerships

Strong delivery partnerships are already in place with Hampshire County Council and Tourism South East. Two specific consultations took place with neighbouring destinations to identify possible opportunities. Both identified possibilities for working more closely together.

- **Wiltshire/Salisbury** – the conversation with Visit Wiltshire focused on the opportunity to be part of [Great West Way](#). This is a major initiative which was funded initially by the Discover England Fund and is led by Visit Wiltshire. It is aiming to create an internationally known touring route from London to Bristol over a 30-year timeframe. Over 260 organisations/businesses are Ambassadors including Newbury and the National Trust who are major sponsors. Whilst Test Valley is slightly to the south of most participants, there could be an opportunity for the north of the Borough. The Great West Way has a 20 mile wide boundary and there are product synergies with a strong heritage/gardens product. The project also offers connections to the international travel trade and London based ground handlers. There are budget implications (Ambassadors contribute at a variety of levels) and careful consideration would need to be given to the potential return on investment. Outwith the Great West Way, there was an openness to further partnership working on a project by project basis.

Winchester – Winchester City Council is particularly looking to increase the length of stay from both overseas and domestic staying visitors and sees Test Valley as an opportunity to help them do so. Romsey and Winchester are seen as complementary places with the Abbey a particular draw. Stockbridge was also an asset to Winchester given its proximity and strong appeal. The current Mayflower 400 work was seen as a good start. Future opportunities that were discussed included walks and trails and a potential VIC-based campaign with reciprocal promotions to the local resident market was also mooted.

- **VisitEngland** – the national tourist board’s strategy to focus on the pre-school market and ‘Peppa Pig’ provides an opportunity to raise the profile of the area around Paultons Park with additional experiences and services that appeal to this market and to gain coverage on relevant social media sites that serve this audience.

Case Study: Ryedale District Council

Ryedale, located in N. Yorkshire shares characteristics with Test Valley. In 2017 the council took the decision to cut its tourism service entirely, but in late 2019 a dedicated tourism development officer was recruited in the Economic Development Team of the council.

Prior to 2017 the council’s approach was not unlike Test Valley’s, with a commissioning approach. This was designed to promote Ryedale as a destination brand within the overall North Yorkshire or North York Moors brand, with a focus on generating traffic to the destination website. The new approach is a more focussed **business development** one, helping businesses to market themselves better and looking to identify and plug gaps in the provision to tourism businesses. The council’s [website](#) has been developed to focus on support to businesses. A specific initiative is the development of a ‘Ryedale’ toolkit for businesses with high quality images and suggested copy for inclusion in their own marketing activity.

Activity focuses on research, business support and product development. This is based partly on a recognition that the rise of 3rd party information sources, review sites, online travel agents etc has diminished the role of the ‘official’ destination marketing and information provision.

The destination has a budget of £45,000 for marketing and the approach is one of working in partnership.

Ryedale has no VICs – its last one closed following an unsuccessful attempt to run it on a commercial basis. See appendix 4 for more information.

3.6 Strengths and Challenges

Strengths

There are a number of strengths to tourism delivery in Test Valley:

- Test Valley Borough Council has developed strong delivery partnerships with Hampshire County Council and TSE. The relationships with agents delivering print and PR activity appear to be working well and are being enhanced.
- Across all channels (face-to-face, web, telephone) the service is reaching over a 100,000 visitors per year.
- TVBC's commissioning model approach to delivering tourism service allows for flexibility and adaptability as resources are not tied up in structures that can be difficult to change. It also brings economies of scale particularly in terms of specific expertise that would be expensive for a Borough Council like Test Valley to support.
- On the marketing side, the rural market towns and the countryside of the Test Valley are a good fit with other parts of the county and the joined up approach with Hampshire reinforces Test Valley's positioning in the marketplace.
- The VIC can demonstrate positive benefits of its networking activity through bringing operators together and resultant joint ventures. Strong attendance is reported at the regular meetings.
- The VIC has strong support from local businesses and its services are valued by them. The staff and manager are well respected.
- Association with nationally recognised brands such as Peppa Pig and Paultons Park provide opportunities for further product development for the pre-school market and some national profile – and a market that is very active on social media via sites such as Mumsnet, The Green parent, Netmums etc.
- There is strong industry goodwill for the Test Valley brand and a desire to work together to do more, evidenced by good attendance and energy at the consultation events and strong participation in the local industry survey.

Challenges/Weaknesses

- An imbalance in activities. While the tourism service undertakes a range of activity, it is VIC centric in terms of resources. There may be an imbalance in the service with some areas relatively underdeveloped – for example, social media, digital content and itinerary development, and networking. The relatively undeveloped social media activity was identified as a concern by consultees, albeit that plans are in hand to address this.
- A lack of awareness of non-VIC elements of the TVBC service amongst the local industry and low awareness of some VIC services amongst businesses.
- Test Valley does not necessarily have high recognition or awareness as a destination outside of the region.
- Tensions in marketing approaches between Test Valley as a borough and the individual towns, with, e.g. a concern that provision is centred in the south of the borough and limited understanding of the coverage that the rest of the borough is given at the VIC

4 Options Appraisal

The following section looks at potential options for the delivery of tourism services in Test Valley. Our research and experience identified that there is no single best practice approach but rather that different destinations utilise different models that suit their local circumstances.

There are multiple potential approaches to tourism delivery. The following sections outline the two core elements:

- Services – i.e. – what could or should be delivered in Test Valley
- Delivery mechanisms – i.e. how those services might be delivered.

4.1 Services

The following table outlines, in broad terms, the key services that Test Valley Borough Council could or should be delivering in the coming years. The table provides an assessment of where the service is under-delivering (i.e. could be doing more – highlighted in yellow) or possibly over-delivering (i.e. the service areas should not be a priority for growth and could possibly be reduced – highlighted in red), or appropriate (i.e. about right – highlighted in green).

Service Area	Areas for future development	Current delivery score
Marketing		
Website	<p>There is a continued need for web based information and, in terms of brand and market positioning there is a good fit between the Test Valley offer and the wider Hampshire offer.</p> <p>Looking forward there are areas where TVBC could and should improve. There is a consumer demand for richer, curated content and ideas, and more use of film/video. Current delivery in this aspect could be improved. Providing content to 3rd party sites on particular themes – such as walking, cycling, fishing and other experiences is increasingly important.</p>	Under-delivery Potential for improvement in content creation
Print	<p>Print, as a mechanism for destination marketing, has declined over the last 10-15 years – a combination of cost, distribution channels and changing customer demands. While some consumers (particularly older age groups) still prefer it, the role of print is primarily for in-destination information (and even this is declining with increased use of mobiles).</p> <p>It can play a role in encouraging visitors to explore further, but distribution at the right locations within the destination is key</p> <p>TVBC's approach is still print heavy and this should be focused more on in-destination print.</p>	Over-delivery - allowing for some rationalisation and better targeting of distribution
Social media	<p>Social media provides an opportunity to develop a loyal following of current, past and potential visitors, and can cost-effectively reach a wide audience. Links with local partners, Visit Hampshire and TSE Social Media campaigns require prompt engagement and relevant and exciting content, including around special events and themes.</p> <p>There are opportunities to enhance this service element – plans are in place to do so; existing accounts need to complement.</p>	Under-delivery - requiring additional time and focus as part of the visitor services programme e.g. a planned approach to maximise opportunities

Service Area	Areas for future development	Current delivery score
PR	<p>PR is a cost effective way to raise awareness and deliver specific messages and should be a key part of the marketing mix.</p> <p>TVBC's current outsourced service is effective, but the VIC team are likely to be aware of local happenings or events that could generate PR.</p>	Appropriate – some improved close communication required.
Partnerships	<p>Partnership marketing and campaign development is both cost effective and helps a destination get wider exposure than it might do in isolation and work in multiple markets simultaneously without generating confusing messages.</p> <p>TVBC's participation in Hampshire wide campaigns and TSE initiatives is cost effective. Other partnerships around themed campaigns – such as Great Western Way, Mayflower 400, national or regional Walks and Cycle Trails could deliver profile at minimum expense.</p>	Appropriate
Third party content	<p>The use of third party sites such as Google, Trip Advisor etc. is a very cost effective way of reaching potential consumers and should form a core component of destination activity</p> <p>Within Test Valley pre-visit information is generally well provided on the various websites that feature Test Valley – including those operated by VisitHampshire, TSE and 3rd parties.</p>	Appropriate - but requires on-going monitoring.
Information Services		
VIC	<p>VICs and the brand of the national network have been eroded in the last 10-15 years. There is no longer a situation where a visitor can expect to find a VIC in every town. Mobiles are providing increasing amounts of in-destination information, and VICs represent a substantial cost.</p> <p>However, VICs still have a potentially important role, particularly for less digitally comfortable visitors. The decision to operate a VIC is largely dictated by local circumstances (demand and need).</p> <p>For TVBC, Romsey VIC has industry support and deals with more enquiries than the website. The meet & greet services for coach groups play an important role in satisfaction of those companies who could potentially bring regular groups of visitors to Romsey in particular.</p>	Over-delivery – in sense of being rare in providing a dedicated VIC. However, it is cost-effectively operated and delivers a wide range of services beyond visitor enquires
TIPs	<p>The TIPs play a role in influencing visitors who may be passing through the district en route to some of the 'honeypot' destinations nearby and can influence them to stay longer or perhaps return. They also help to ensure that local people are aware of the area's attractions which potentially influences local day visits and the Visiting Friends and Relatives market.</p> <p>Leaflet distribution around the borough is effective via the TIPs but there is potential to improve information available in hotels and at attractions via targeted distribution of maps and leaflets and on-going liaison with these businesses.</p>	Appropriate Requires on-going management

Other Services		
Networking/business support	<p>Tourism is a fast changing industry, with digital transformations, changing market trends and increasing competition. Helping local businesses to be aware of changes and sharing insights will be key to ensuring their on-going success.</p> <p>Strong networks also facilitate communications from the industry (in terms of developing social media posts, PR opportunities, and web content) and between industry (helping to create partnerships and joint ventures).</p>	Under-delivery with clear potential to improve and desire to do so

4.2 Delivery Mechanisms

In terms of delivery models, the following table identifies three potential approaches and their advantages and disadvantages.

Delivery Mechanism	Advantages	Disadvantages
<p>In-house delivery The majority of the service (e.g. VIC, website) are delivered within TVBC</p>	<ul style="list-style-type: none"> • Direct control and management of services • Ease of integration with other council services if required 	<ul style="list-style-type: none"> • Management costs • Potential lack of specific tourism operational expertise within TVBC
<p>Contract Services delivered through a third party – can be single or multiple</p>	<ul style="list-style-type: none"> • Economies of scale • Expertise across multiple areas of delivery • Flexibility to change services 	<ul style="list-style-type: none"> • Lack of direct control if there are service delivery issues • Supplier dependency - i.e. changing a supplier would have a risk of lack of continuity in service delivery (mitigated where multiple contracts are in place)
<p>Voluntary / commercial Substantial parts of the service (e.g. the VIC, website) are operated on a volunteer and / commercial basis</p>	<ul style="list-style-type: none"> • Low cost delivery option • Potential to give community / trade groups greater ownership of delivery 	<ul style="list-style-type: none"> • Lack of direct control if there are service delivery issues • High risk – these services do not tend to cover their costs in the longer term (see Ryedale case study)

4.3 Options

Combining services (section 4.1) and delivery mechanisms (4.2) there are three broad options for TVBC (albeit with nuances). These are summarised in the following table:

Option	Description	Advantages	Disadvantages
1- Status Quo	Retain the approach as it is	<ul style="list-style-type: none"> • Continuity • Easy to implement 	<ul style="list-style-type: none"> • Does not recognise changes to accessing information • Does not make best use of staff skills • Does not address expressed stakeholder desires

2- Evolution	Change the role of the VIC and its manager (more networking and business engagement, a more proactive PR, social media and content development programme) and explore further partnerships with neighbouring destinations or consortia such as Winchester, Great West Way etc.	<ul style="list-style-type: none"> Retains skill set and contacts Adapts to changes in information access Can be met from existing budgets Adapts to expressed industry wishes Allows changes to the existing 'commissioning' approach Provides continuity for existing work/progress 	<ul style="list-style-type: none"> Need to renegotiate roles and responsibilities with TSE/service provider
3- Revolution	Close VIC and redistribute £70k to marketing and online presence	<ul style="list-style-type: none"> Frees up resources to undertake more external marketing (as opposed to servicing their needs when in Test Valley) Potential to add to the in-house staff resource or invest in 3rd party delivery 	<ul style="list-style-type: none"> Significant change Removes popular and well-used facility Loss of staff knowledge and contacts Potential need to 'start again' with networking Removes local facility e.g. Plaza Box office Removes 'focal point' for tourism in Test Valley Potential transition costs and need to increase staff on TVBC payroll Digital marketing requires staff time rather than just cash spend.

4.4 Recommended approach

We would recommend that the approach should be **evolutionary**. The delivery mechanism, working with a variety of private and public sector partners, is cost effective and provides flexibility and economies of scale.

The balance of service delivery needs to be re-visited. The VIC should continue to play a central part of this service but with a greater emphasis and a more proactive approach to certain service areas – networking, social media, PR, content development – and on partnerships.



5 Service Area Development

The recommended approach is around evolving the current model of tourism delivery in the Test Valley. The current commissioning model for services delivered on behalf of the council works well and, whilst new opportunities will arise, a fundamental change is unlikely to achieve greater benefits.

Service areas should evolve. The following tables outline recommended developments for particular service areas.

5.1 Marketing/Social Media

Recommendation	Rationale	Partners	Budget Implications	Timescales
1. Review the print-based activity to ensure it is 'fit for purpose' and there is no duplication of effort, particularly developing a clear distribution plan	Although still useful, print is a declining medium and should be regularly reviewed for its cost-effectiveness and impact	The Marketing Collective Visit Hampshire Local Stakeholders	Needs to be neutral or deliver savings	Review Autumn 2020 for 2021 season
2. Support the establishment of new official social media channels with utilisation of the accounts of partners	Existing partners have huge reach which will benefit the Test Valley messages	The Marketing Collective Paultons Park Mottisfont/National Trust Hillier Gardens Other major attractions	Staff Time	Develop with rollout of new channels – Summer 2020
3. Establish links from major websites – such as Paultons Park – providing information on accommodation and other family friendly activities in the vicinity and themed itineraries	As above, maximises the exposure available from major players in the borough	Visit Hampshire Paultons Park Mottisfont/National Trust Hillier Gardens Other major attractions	Staff Time	Explore Summer 2020 for 2021 implementation

Recommendation	Rationale	Partners	Budget Implications	Timescales
4. Introduce an 'In the Test Valley' sub brand approach to individual town's efforts, including at the VIC-consider especially VIC name and social media account names	Meets the individual community aspirations and acknowledge strength/diversity whilst providing a linking element. Proliferation and duplication will need to be avoided with a clear hierarchy from Hampshire to the individual towns with Test Valley at the heart of the branding, linking in both directions.	Andover BID Romsey Futures/Chamber of Commerce Stockbridge Business Association Local Industry	Staff time – small design cost	Explore Spring/Summer 2020 for 2021 implementation
5. Supplement existing networking arrangements with introduction of regular e-communication (annual or bi-annual) to local industry e.g. closed social media groups and e-blasts	Consultation has shown that local stakeholders are focussed on the VIC service to the detriment of other areas. This will raise the profile of that other work to businesses who do not attend events	Local Industry	Staff time	First e-communication September 2020
6. Consider the introduction of one or two key marketing themes for each year as a means of engaging businesses in destination efforts	Like events/anniversaries – themes (e.g. Family Friendly, Peppa Pig, Escape to the Country, Pet Friendly, Fishing Heritage) provide a focus which businesses can get behind and support, and create PR opportunities. The visitor guide already does this to a point but there is an opportunity to expand across all platforms	Local industry Visit Hampshire Other LA's	Staff time (initially)	Longer term, discuss and consider for implementation in 2022 onwards

VIC services

Recommendation	Rationale	Partners	Budget Implications	Timescales
7. Use the opportunity of the end of the current TSE delivery contract to enhance the networking and business	Helps to develop industry relationships and partnerships, creates opportunities for the VIC to get 'stories' (for social media, PR, content) and to develop	TSE/Delivery partner Local Industry	Will require redistribution of staff time and potential additional hours for	Define new requirements in time for new

Recommendation	Rationale	Partners	Budget Implications	Timescales
support aspects of the role of the VIC manager in a future contract	businesses (training opportunities, news etc.).		other staff est. £5-£6,000	tendering – September 2020 ¹
8. Use the networks already established to support the collection and curation of content for the new official social media channels delivered	Social media success relies on a partnership approach with fresh information on an ongoing basis, the VIC has the relationships in place already	The Marketing Collective Local Industry	Staff Time	Commence pre-launch (April 2020)
9. Focus on developing new content for distribution to 3rd party websites (such as TripAdvisor). Content would include copyright free images, listicles (e.g. top ten things to do with children)	Cost effectively maximises the existing local knowledge of VIC staff to raise awareness of product to new visitors	VisitBritain, Visit England, TSE, Visit Hampshire and travel media and blog sites	Staff Time	May need to be included in contract renewal tender- September 2020
10. Establish closer relationships between the VIC manager and the council's PR agent to proactively identify stories/content for the mainstream and specialist media & communicate with local industry	Maximises use of the existing local knowledge of VIC staff, reduces duplication of effort and confusion amongst stakeholders	Rachel Shimmell PR Local Industry	Staff Time	Can be implemented immediately – April 2020
11. Consider promotion of the VIC and Test Valley through pop up events at major local employers e.g. Chemring, USSP to complement current pop ups at major events/attractions	The strong local employer base in the north and south of the Borough is an opportunity to enhance VFR tourism away from traditional 'honeypots' nearby	Local Major Employers	May require exhibition displays or similar est. £2,000	May need to be included in contract renewal tender- September 2020
12. Consider introducing a volunteer support programme at the VIC, particularly for Sundays and around special events	There was an expressed demand from industry for longer opening hours (e.g. Sunday opening) but there are limited financial resources to deliver (there is an engaged community base in Romsey)	Romsey Future TSE	Staff time	Pilot in Summer (coincided with Abbey 900 th events)

¹ This date is subject to discussion with TVBC

Recommendation	Rationale	Partners	Budget Implications	Timescales
13. Regularly review the usage of the VIC to ensure value for money and suitability (retain contract duration at 3 years) and implement ‘type of enquiry’ monitoring at the counter	Consumer behaviour is dynamic and changing rapidly, the VIC is already collecting data on a monthly basis which should inform future decisions. 3 years is considered the minimum viable period for operational security.	TSE/Service provider	Staff time	May need to be included in contract renewal tender- September 2020

Business Support

Recommendation	Rationale	Partners	Budget Implications	Timescales
14. Support the roll out of the new media social channels with workshops followed by regular coordination meetings	To ensure a regular flow of content/stories – essential for social media success	The Marketing Collective Local Industry	Staff time	Immediate
15. Continue with the ‘ 3 Towns ’ discussion group that met in January 2020	To break down barriers and foster a ‘Test Valley’ approach across the three towns	Andover Vision Andover BID Romsey Futures/Chamber of Commerce Stockbridge Business Association	Staff time	Commence Summer 2020
16. Consider the introduction of a ‘ Test Valley Ambassador ’ programme delivering brand toolkits and regular communications to the local industry (emails, private social networks etc.)	Brand building will require the efforts of all businesses to complement the TVBC activity. An Ambassador programme fosters ownership of the destination	Local Industry	Materials will require budget est. £3,000	Consult & Develop for implementation in early 2021
17. Use the existing industry contact process to identify and plan for major events e.g. Romsey Abbey 900th, anniversaries e.g. Mayflower 400	The impact of events is maximised by engaging with local stakeholders as soon as possible	Local Industry Event Organisers	Staff Time	Use Abbey events as catalyst – Summer 2020

Recommendation	Rationale	Partners	Budget Implications	Timescales
18. Implement a user survey at the VIC and explore a potential wider destination visitor survey	Expressed desire to gain greater insight into the market for the facility	TSE	Professional Research required Est. VIC survey £5,000 Destination Survey £10-£15,000	Ideally implement for June 2020

Partnerships

Recommendation	Rationale	Partners	Budget Implications	Timescales
19. Develop a 1:1 relationship with Winchester to pursue specific projects and complement Hampshire-level arrangements	Clear support and desire from nearby destination to work with TVBC	Winchester City Council	TBC	Commence Summer/Autumn 2020 (potential reciprocal promotion for Christmas 2020)
20. Explore Visit Wiltshire opportunities (see section 3.5)	'Andover Anomaly' – proximity of north of Borough to Wiltshire and key East-West routes provides opportunities to resolve expressed concerns	Visit Wiltshire Andover BID	Great West Way has potential considerable budget implications	Discuss 2020 for 2021 implementation
21. Have the ability to participate in appropriate regional or national campaigns	Specific target markets (groups, young families, foodies) will be targeted at a national/regional level. Test Valley could benefit from inclusion	TSE Visit England/Visit Britain	Est. £5,000 allocation	Reactive-opportunities will arise

Appendix 1: Review of Romsey VIC Performance – Historical Data

Introduction

Romsey Visitor Information Centre (VIC) has been managed on contract to Test Valley Borough Council (TVBC) by Tourism South East for a number of years. The VIC has a monthly reporting framework across a number of indicators which are analysed and presented below.

The role of the VIC is wider than these indicators, with the business to business relationships that are fostered through having a highly visible ‘face of tourism’ in the borough and the bi-annual meetings, that are held in various locations in Test Valley, seen as critical. The VIC manager has provided a list of successes that have arisen from these business relationships which are attached at the end of Appendix.

Nevertheless, the bulk of the work of the VIC remains as a customer facility, open to visitors and residents alike. This community role has also been stressed and is reflected in a relatively consistent year-round performance with high footfall in, especially, November and December.

Data has been provided from April 2017 with figures up to the end of February 2020. This is not quite a full year but is sufficient to give clear picture of trends. For some indicators an 11 month ‘Year to Date’ analysis is presented to give comparable data. The environment for retail and physical information services is currently extremely challenging, with high street names ceasing trading on a regular basis. In Romsey, there has been a decrease in town centre footfall of 103,860 from 2014 to 2019. This equates to a 12% drop, creating a difficult local trading environment in which the VIC operates and putting any decrease in usage into context. The local decrease in footfall could also be attributed to a programme of public realm improvements and road works during Summer 2019. It has also been noted that the VIC was covered in scaffolding for a period in 2019 and gave the appearance of being ‘closed’. It may be useful to review visitor figures to St John’s House over the same period for benchmarking purposes.

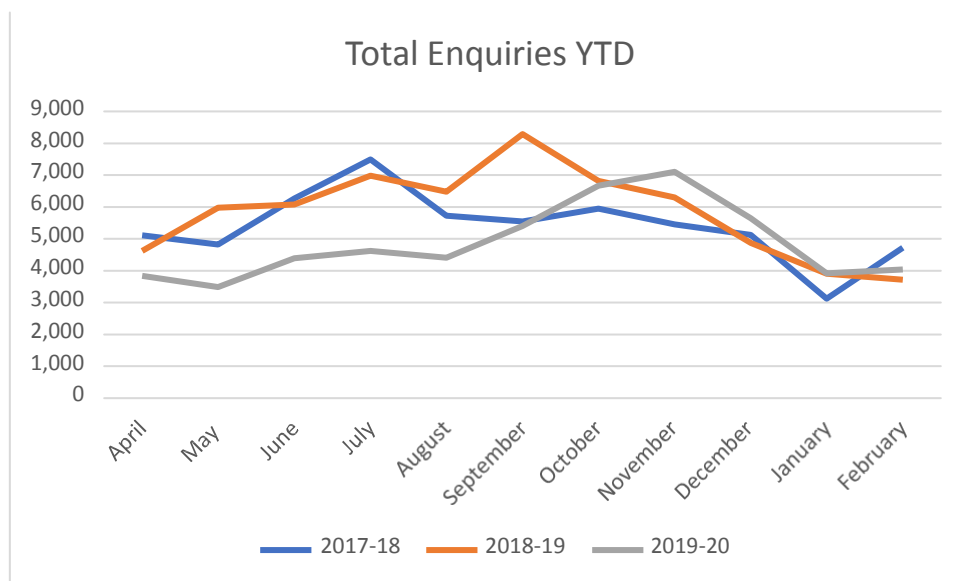
Total Enquiries

The total enquiries figure supplied by TSE is an amalgamation of walk-in customers, phone calls and emails plus social media interactions. It should therefore be seen as the primary indicator of performance. Total enquiries grew between 2017-18 and 2018-19 from 62,895 to 68,704 – a 9.2% increase. There was a particularly large increase in September 2018 which is due to the VIC being allowed to sell Romsey Show tickets up to the day before the event at the ‘advance’ price (the only outlet able to do so). This resulted in extremely strong demand for tickets over a number of days, creating this anomalous spike in visitors.

Total enquiries at Romsey VIC			
	2017-18	2018-19	2019-20
April	5,114	4,624	3,837
May	4,819	5,979	3,487
June	6,271	6,078	4,388
July	7,491	6,979	4,616
August	5,725	6,479	4,413
September	5,541	8,287	5,399
October	5,949	6,821	6,665
November	5,450	6,294	7,102
December	5,121	4,867	5,642
January	3,122	3,906	3,919
February	4,719	3,715	4,035
March	3,573	4,675	
Total	62,895	68,704	53,505
% Increase		9.2%	N/A

The year to date enquiries for April to February 2019/20 show a decrease compared to previous years. The monthly breakdown graph indicates that June, July and August were the months where usage declined vs. previous years with November and December showing increases.

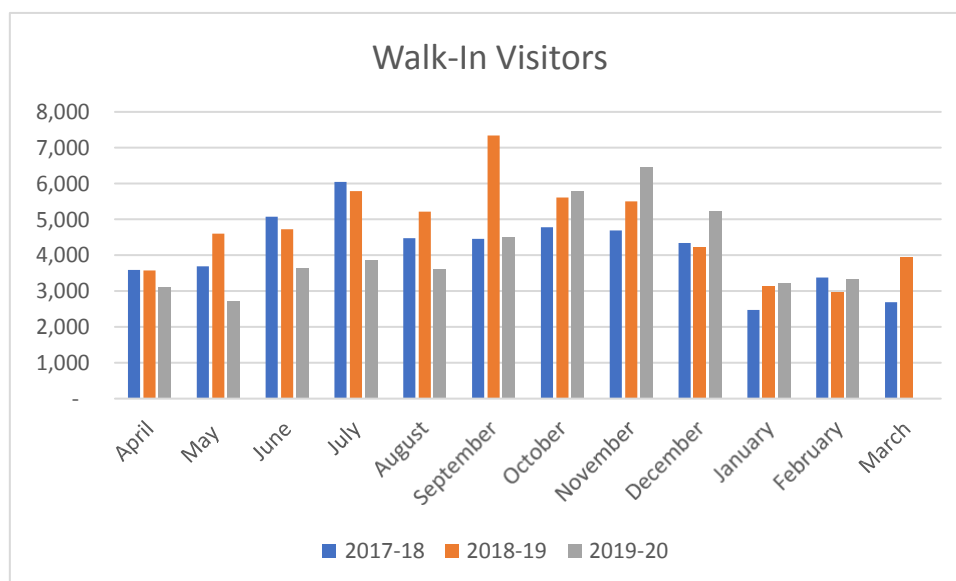
Total enquiries at Romsey VIC (Based on April-February figures)			
	2017-18	2018-19	2019-20
Total Enquiries (YTD)	59,322	64,029	53,503
Year on Year Change (%)		8%	-16%



Walk Ins

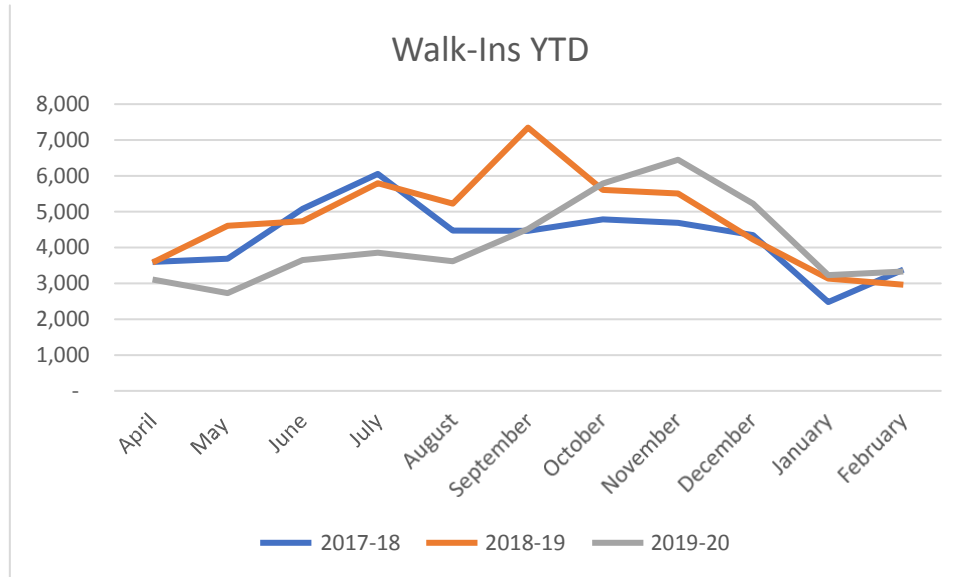
Walk Ins (i.e. customers who physically visited the VIC) represent by far the largest number of customers and therefore reflect the 'total enquiries' results. The table also shows the spike in September 2018 was largely due to walk in customers.

Walk In customers at Romsey VIC			
	2017-18	2018-19	2019-20
April	3,595	3,575	3,106
May	3,689	4,605	2,725
June	5,077	4,726	3,645
July	6,053	5,789	3,857
August	4,475	5,220	3,612
September	4,463	7,343	4,517
October	4,779	5,607	5,782
November	4,687	5,506	6,448
December	4,342	4,217	5,223
January	2,478	3,127	3,232
February	3,380	2,960	3,325
March	2,693	3,952	0
Total	49,711	56,627	45,472



Year to date analysis also reflects Total Enquiries, with lower figures in the current year against an increase in 2018-19. The year on year percentage change in the year to date is shown in the table below. The monthly breakdown in the graph demonstrates that the VIC performed better in the Winter of 2019-20 than in previous years but less well earlier in the year.

Walk in Visitors at Romsey VIC (Based on April-February figures)			
	2017-18	2018-19	2019-20
Walk Ins (YTD)	47,018	52,675	45,472
Year on Year change	-	12%	-14%



Overseas Walk Ins

The VIC also tracks visitors from other countries as a separate indicator. The overall numbers here are much smaller, which can lead to a more volatile picture. There has been a dramatic reduction in overseas visitors (given the small sample this can happen) which could be down to macro factors or more local considerations, such as cruise coach visits. The year to date totals are shown in the table.

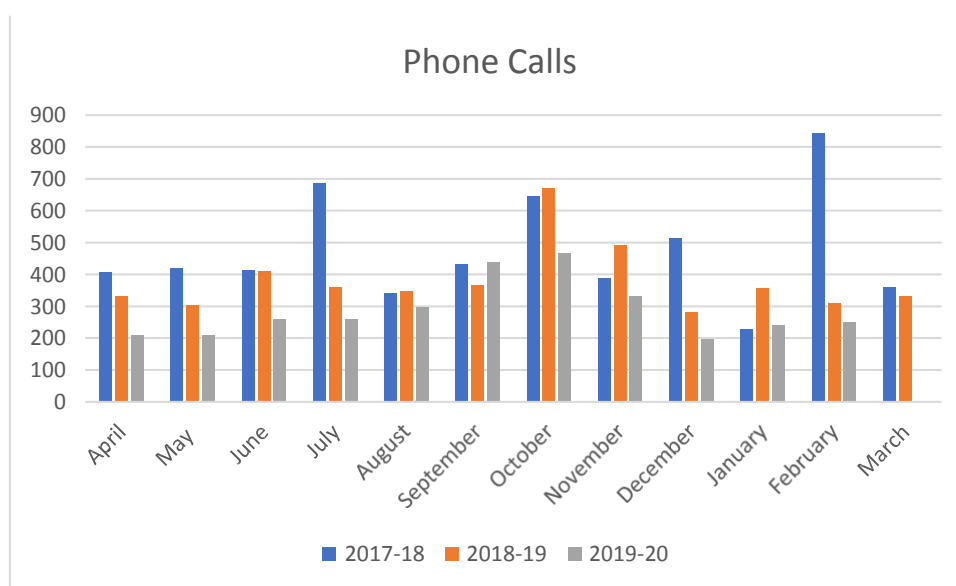
Overseas Visitors at Romsey VIC (Based on April-February figures)			
	2017-18	2018-19	2019-20
Overseas Walk Ins (YTD)	1,193	1,443	807
Year on Year Change	-	21%	-44%

Phone Calls

The next largest indicator to 'walk ins' by volume is the telephone – about 6% of total enquiries. This shows a decreasing volume of calls with two anomalous spikes in February 2018 (caused by a very popular event at the Plaza Theatre) and July 2017 (Romsey Festival-which the VIC promoted).

Phone Calls at Romsey VIC			
	2017-18	2018-19	2019-20
April	407	331	209
May	418	303	207
June	413	409	259

Phone Calls at Romsey VIC			
	2017-18	2018-19	2019-20
July	685	358	259
August	340	347	298
September	432	365	438
October	647	672	465
November	388	491	332
December	513	280	197
January	229	357	242
February	842	308	251
March	360	331	
Total	5,674	4,552	3,157



The year to date figures show a reduction over the last three financial years.

Phone Calls at Romsey VIC (Based on April-February figures)			
	2017-18	2018-19	2019-20
Phone Calls (YTD)	5,314	4,221	3,157
Year on Year change		-21%	-25%

Emails

Emails form a much smaller part of the VIC workload, with the volume of enquiries in the tens rather than the hundreds. With smaller numbers it is not surprising that there are significant anomalies between specific months in the relative years, so this data is not shown. Annualising the figures gives a more reliable picture. The total of all emails received for the year to date has decreased from 146 in 2017-18 and 143 in 2018-19 to 121 in 2019-20, representing a 17% decrease.

Social Media

The VIC operates two official social media accounts on behalf of TVBC:

- Facebook: 'Romsey Visitor Information Centre' - 125 likes and 150 followers
- Twitter: 'Romsey Vic' @moreRomsey – 978 followers

There has been a deliberate policy of becoming more selective in the use of Facebook in 2019-20 which has resulted in a drop in activity but a less dramatic downturn in Facebook 'likes'. The changes in social media policy are designed to optimize the reach of each tweet/post, aiming 'effective content regarding events and interests by region and timescale to best match interests of users.'

The daily output for tweets and posts average nearly 5 per platform to date which, the VIC team understands, is accepted as good guidance to achieve suitable engagement across each platform.

Twitter

The VIC monitors three aspects of Twitter usage: Number of Tweets (activity), New Followers (attractiveness) and Mentions (awareness). As with emails, the individual monthly numbers are quite small so prone to variation, but the annual numbers are consistent. Total tweets for the year to date, providing comparable data shows a consistent pattern in volume.

Twitter Numbers YTD			
	2017-18	2018-19	2019-20
No. of Tweets	1,981	1,642	1,721

New followers have also been attracted in a consistent and regular manner with an understandable drop off in interest as the account matures and the numbers of potential new recruits dwindle. There are clear peaks in May and September and also February and March. Total annual new followers have been 231, 189 & 191 across the three financial years.

Twitter mentions also show a consistent pattern. This indicator does, however, show much better performance in 2018-19 than in either of the other two years. Total mentions in the Year to Date in 2018-19 were 1,845 versus 1,495 in 2017-18 and 949 in 2019-20.

Facebook

As already noted, there has been a deliberate policy to become more selective in the use of Facebook in the current year. There have only been 846 posts in the year to date compared with approximately 1,700 in the two previous years.

This has not, however, had an unduly negative effect on the number of 'likes' which have stayed consistent with previous years. The total for the year to date is 221, versus 241 in 2017-18 and 226 in 2018-19. Whilst this is a reduction, it is in the order of 9% year on year rather than the 55% in the number of posts, reflecting a successful change in strategy.

Comparison with Petersfield

TSE also manage Petersfield VIC on behalf of East Hampshire Borough Council and have provided an identical data set to allow for comparison with Romsey. The volume of customer contacts at Petersfield is approximately half of Romsey's.

The two VICs do not show consistent trends over the last three years. An identical 'year to date' analysis (**NB this is April to October**) has been undertaken of the three largest indicators by volume to give a consistent picture. The table below demonstrates the total figures and how they compare in terms of year on year percentage changes.

Year to Date comparison – Romsey & Petersfield VICs			
	2017-18	2018-19	2019-20
Total Enquiries			
Romsey	40,910	45,247	32,805
Year on Year change	-	10%	-27%
Petersfield	17,323	14,070	15,955
Year on Year change	-	-19%	13%
Walk Ins			
Romsey	32,131	36,865	27,244
Year on Year change	-	15%	-26%
Petersfield	13,690	11,510	12,629
Year on Year change	-	-16%	10%
Phone Calls			
Romsey	3,342	2,785	2,135
Year on Year change	-	-17%	-23%
Petersfield	682	592	408
Year on Year change	-	-13%	-31%

Other Activities

The VIC is active in:

- Facilitating relationship development and networking through holding the twice yearly Tourism Meetings in different venues throughout the borough. This has resulted in the development of a number of business relationships – e.g. introducing Houghton Lodge to Daisy's Cakes resulting in an agreement on tearoom operation, development of Accommodation/Entry ticket stays and visits with Paultons Park.
- Familiarisation visits – e.g. arranging for staff to attend various Test Valley events to promote the borough to visitors. Examples include Thruxton 50th Anniversary weekend, Romsey Show.
- Organising the 'VIC on the road' days with staff promoting Test Valley to visitors at Mottisfont, Paultons Park, Sir Harold Hiller Gardens.
- Attending UK Tourism Fairs to promote the Test Valley.
- Approaching coach companies to encourage visits to Romsey and the rest of Test Valley.
- Conducting tours and welcome visits for groups visiting Romsey and Andover.
- Hosting a Cruise Shore Excursion company tour of Romsey to promote all that the town could offer a shore excursion day trip for visiting cruise ships.
- Providing continued support to local artists to stock and sell their products in the VIC.

Appendix 2: Visitor Information Survey

Methodology

The Visitor Information Survey consisted of an online survey issued to destinations similar to Test Valley at a national level and a regional distribution via Tourism South East (TSE).

The purpose of the survey was to understand the nature of service delivery and performance characteristics across those comparator destinations. These were seen as smaller, less well known rural destinations. The survey was complemented by one-to-one conversations with four respondents, two regional and two national.

The survey was conducted in December 2019 and January 2020.

Responses were received from

- Eden District Council
- Medway Council
- Ribble Valley Borough Council
- Thanet District Council
- Visit Brighton
- Visit Portsmouth / PCC
- Warwick Visitor Information Centre

The sample was not large and was split approximately 50/50 between the 'benchmark' destinations and the 'regional' ones. As such, the results need to be treated with some caution although they do provide indicative results on practice and performance.

Results

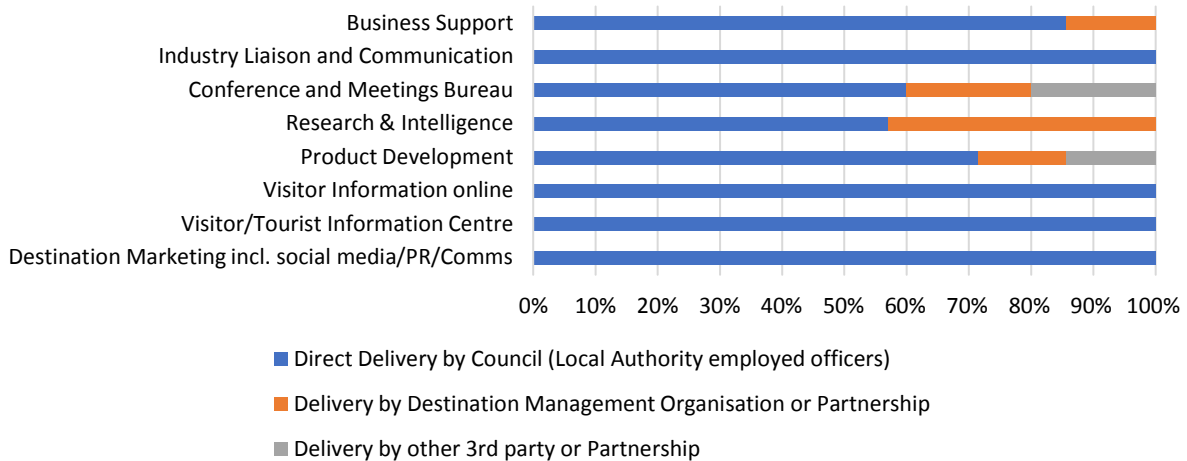
Question 1: Does your Organisation/Council have a dedicated tourism resource (this can either be part or all of a role/team)? This was ticked as 'yes' by all respondents. Job titles were requested to elicit whether tourism was all or part of their responsibilities, five were fully committed to tourism, with two incorporating with other responsibilities, one did not provide an answer. All who responded confirmed that they held full-time contracts (1 job share). Job titles included:

- Tourism **& Heritage** Manager
- Tourism Manager
- Head of Sales, Partnership and Marketing (Visit Brighton)
- Visitor Services and Development Manager
- Tourism **and Events** Officer
- Joint Tourism Manager (Job Share / 1 post)

Question 2: Responsibility for individual parts of service delivery.

All respondents delivered what might be considered the 'core' services of destination marketing/PR/social media plus visitor information **in-house using local authority employees**. As might be expected, specialist services such as research and intelligence, conference bureau and, in one case, business support are delivered on the council's behalf by other providers.

Individual Service Delivery



Test Valley therefore operates on a different model from the other respondents, with an arm's length approach to the delivery of visitor information services and a disaggregated model for marketing (delivered through Visit Hampshire and a contracted PR consultant).

Question 3 (a) – Staff Employed in Service Delivery

	Number of staff delivering destination marketing (FTE)	Number of staff delivering visitor information (FTE)
Eden District Council	1.5	3
Medway Council	1	3
Ribble Valley Borough Council	1	2.5
Test Valley	TBC	2.3
Thanet District Council	2.5	3
Visit Portsmouth / PCC	2.5	2
VisitBrighton	2.5	1
Warwick Visitor Information Centre		4

Resource levels differ, as might be expected, with the larger authorities having more destination marketing staff and the smaller rural districts having less. For visitor information staff, the apparent anomaly of Brighton having the lowest number can be explained by the closure of their VICs with the member of staff managing 15 Tourist Information Point located throughout the city.

Question 3 (b) – VIC and Website Usage

Respondents were asked to provide two main indicators of usage, visits to their information centre and unique users to the main destination website for the most recent 12-month period. In Test Valley’s case the main website was the relevant pages of Visit Hampshire rather than the Visit Romsey site.

	Total visits to your Information centre (most recent 12 months)	Unique users to your main destination website (most recent 12 months)
Eden District Council	30,000	
Medway Council	193,931	Not available (server down)
Ribble Valley Borough Council	60,000	Not provided
Test Valley	47,000	30,957
Thanet District Council	86,886	55,359
Visit Portsmouth / PCC	Not known	767,151
VisitBrighton	No longer has a VIC	200,000
Warwick Visitor Information Centre	32,000	70,000

Question 3(c) – Budgets

	Budget allocated to destination marketing (£)	Budget allocated to visitor information (£)
Eden District Council	Not provided	Not provided
Medway Council	75,000	200,000
Ribble Valley Borough Council	56,000	n/a
Test Valley	11,000	70,000
Thanet District Council	19,800	68,000
Visit Portsmouth / PCC	170,000	Self-supporting through sale of goods and vended food and drink or part of Museum offer - none
Visit Brighton	180,000	0
Warwick Visitor Information Centre		8,000

There are significant variations within the sample, with the two large authorities (and Medway) investing much larger amounts than the smaller ones. Thanet and Ribble Valley are investing similar amounts to Test Valley. Some respondents have not included staff costs, e.g. Warwick has four FTE staff and a budget of £8,000, which complicates comparisons. An assumption of £20,000 per full time member of staff (4) would increase that to £88,000.

The following sections look at some comparable analysis across services. Given the available data these should be treated with some caution.

Analysis 1 - Cost per VIC visitor

Three respondents provided sufficient data for a comparison to be made between the budget for information and the total number of visits (including the estimate for Warwick detailed above). The analysis indicates an average cost per visitor for Test Valley of £1.49 and visitors to staff member of approximately 20,400.

	Information Budget (£)	Total visits (last 12 months)	Cost per visitor (£)	No. FTE staff	No. Visitors per member of staff
Medway	200,000	193,931	1.03	3	64,644
Test Valley	70,000	47,006	1.49	2.3	20,437
Thanet	68,000	86,886	0.78	3	28,962
Warwick	88,000	32,000	2.75	4	8,000
Total/Average	426,000	359,823	1.18		35,982

Analysis 2 – cost per unique web user

A different sample provided enough data to produce a cost per unique website user analysis. It is emphasised that these figures should only be taken as a rough guide to performance as the marketing budget will also be invested in other areas of activity such as social media, and destination profile will also impact. For Test Valley, the responsibility for driving traffic to the website rests with Visit Hampshire/Hampshire CC.

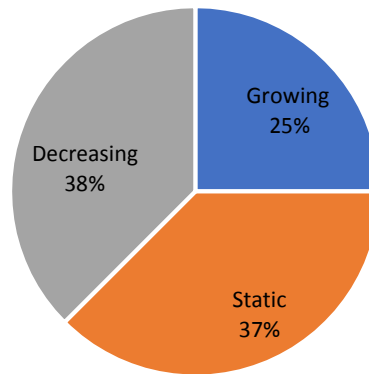
	Marketing Budget	Website Unique Users	Cost per unique user
Test Valley	11,000	30,957	0.36
Thanet	19,800	55,359	0.36
Visit Portsmouth	170,000	767,151	0.22
Visit Brighton	180,000	200,000	0.90

Cost per unique web user for Test Valley was £0.36.

Question 4 – Service Budget and Usage

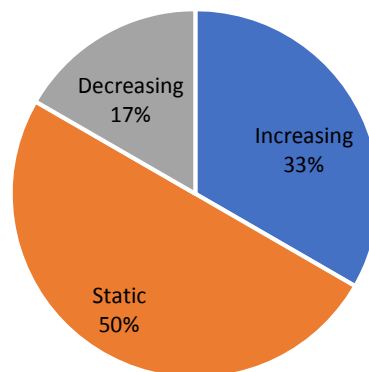
There was a broadly even split with regard to the trends in service budget and resources, with about a third indicating their resources were decreasing or static and a quarter experiencing growth. Test Valley's budget is understood to be 'static'.

Service (Budget & Resources)



VIC Usage

VIC Usage



VIC usage was static for 50% of respondents. Of those experiencing growth, one (Medway) was caused by relocation next to a new coach park and train station which had increased usage.

Question 4(b)- Future Changes

The vast majority of the respondents (5 out of 6) confirmed that they expect to need to make changes in the next two years. This could have been expected given the ongoing changes in local government funding.

Question 5 - Description of Service and how it is run/located

The survey asked respondents to describe their VIC services, how many VIC's they had and how they were managed or located (e.g. stand alone or inside an attraction/transport centre). Given the small sample there was huge variety, with a number of voluntary or shared locations running alongside

direct council provision. The most radical provision was at Brighton who have no VIC's but a series of 15 information points which are service and managed by one member of staff.

Respondent	No of VIC's	Comments
Eden District Council	3	1 VIC is run directly by Eden District Council Another TIC is part of a joint venture between Eden District Council and Cumbria County Council which includes a library Others around the district are run either by local Town Councils, Community Interest Companies
Medway Council	1	Dedicated VIC - stand alone
Ribble Valley Borough Council	2	One Local authority One voluntary
Test Valley	1	Romsey VIC managed by TSE on behalf of TVBC
Thanet District Council	3	1 council run Thanet Visitor Information Service 1 seasonal information kiosk run by volunteers in Broadstairs 1 funded by partnerships
Visit Portsmouth/PCC	3	We have a stand-alone Information Point within our main bus station and close to major attractions, we also have Information Points in Portsmouth Museum and The D-Day Story, staffed by the museum team.
Visit Brighton	0	I manage 15 Visitor Information Points. They are delivered by partner businesses, such as hotels, libraries, shopping centre, travel centre, venues, a church and a casino.
Warwick Visitor Information Centre	2	Stand alone, we do social media, fam trips, business liaison.

Summary Findings

- The survey sample provided little evidence of consistent trends, it is clear that local solutions are being dictated by local circumstances and it is very much a 'horses for courses' approach
- Resources are relatively static although change is expected in the majority of places
- Test Valley is probably 'ahead of the curve' in terms of a disaggregated or 'commissioned' delivery model
- Similarly, there is little evidence of the more proactive services delivered at Romsey such as the Coach meet and greet and the management of fam trips and social media
- Romsey VIC is, when looked at in terms of (customers serviced) and the cost per visitor, relatively well resourced
- Other VIC's (e.g. Warwick) are delivering social media, business liaison etc in the same way as Romsey
- There is evidence of voluntary and community delivery in small rural areas. It should be noted that there is normally a paid coordinator who manages volunteers
- The 'best practice' model is therefore very much the best local solution, rather than identifying models in place in other areas as exemplars

Appendix 3: Local Industry Survey

Methodology

The local industry survey was conducted online to contacts on databases provided Test Valley Borough Council (of 28 businesses) and the Romsey Futures Tourism Group (17 businesses). There were also a small number of single respondents -the total distribution was to 46 businesses/organisations.

The survey elicited 14 respondents - a 30% response rate which provides some indicative findings. The survey was complemented by one-to-one conversations with key local stakeholders including Paultons Park and the Marketing Collective.

Sample - the sample was dominated by Romsey businesses.

Town/Village	No. of respondents
Romsey	9
Stockbridge	2
Andover	2
Chandler's Ford	1

The sample achieved good penetration into the attractions sector.

Business Type	No. of respondents
Attraction	6
Bed & Breakfast	3
Hotel/Inn	2
Venue	2
Transport	1
Chamber of Commerce	1

Results

Question 1: Main reasons to visit Test Valley

Respondent were asked to provide a maximum of five reasons why visitors would come to the area. The results are presented in a 'Word Cloud' which has the most frequently mentioned reasons in the largest text.

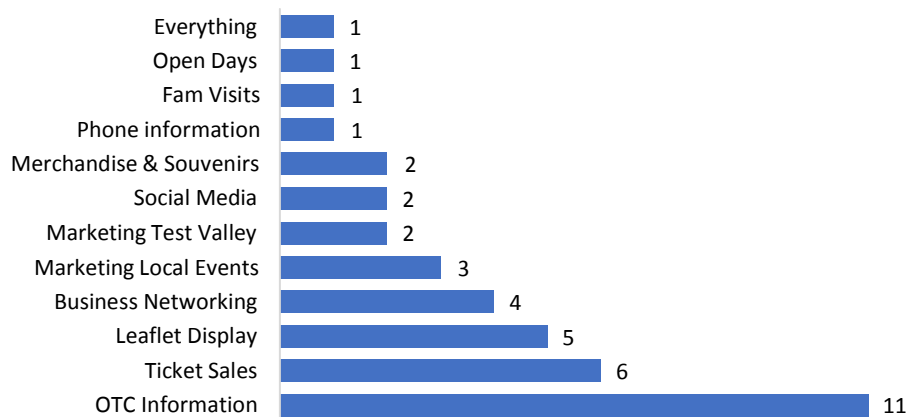
- Relatively high numbers (more than 50% of the sample) were not aware of the TIP management service, meet and greet service for groups, open days, the VIC's community role and the support for local artists
- Only one business believed they had benefitted from the Meet & Greet Service for Groups – Romsey Abbey

Specific Service	Aware of	Benefitted from	No response Not Aware
Over the counter/telephone information	7	6	5
Referral/booking of visitors to your business	8	8	2
Displaying your marketing material in the VIC	6	8	5
Event promotion at the VIC	6	7	5
Social Media accounts (incl. your marketing messages)	7	9	4
Tourist Information Point Management (incl. displaying your marketing material)	7	7	8
Pop Up information centre at major events	4	3	12
Business support and networking meetings	6	7	4
Informal business networking and contacts	7	6	5
Familiarisation Visits	6	6	6
Meet & Greet Service for Groups	7	1	8
Open Days	6	2	8
Community role	6	3	8
Ticket Sales	8	4	6
Local artist and company support through sales opportunities	7	1	8

Question 3: Services delivered well by the VIC

This was an open question, so the graph represents the numbers of mentions for specific services rather than an approval rating against specific services. The core 'over the counter' (OTC) information service scored very highly and the strong score for ticket sales indicates that the local venues are happy with the service. The way that the VIC displays literature, the marketing of local events and the Business Networking events were also felt to be performing well by larger numbers of respondents.

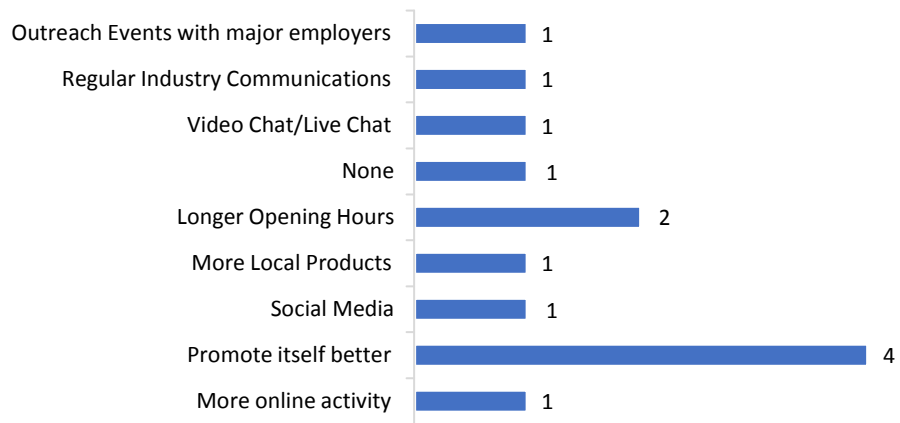
Services Delivered Well (no of respondents)



Question 4: Room for improvement

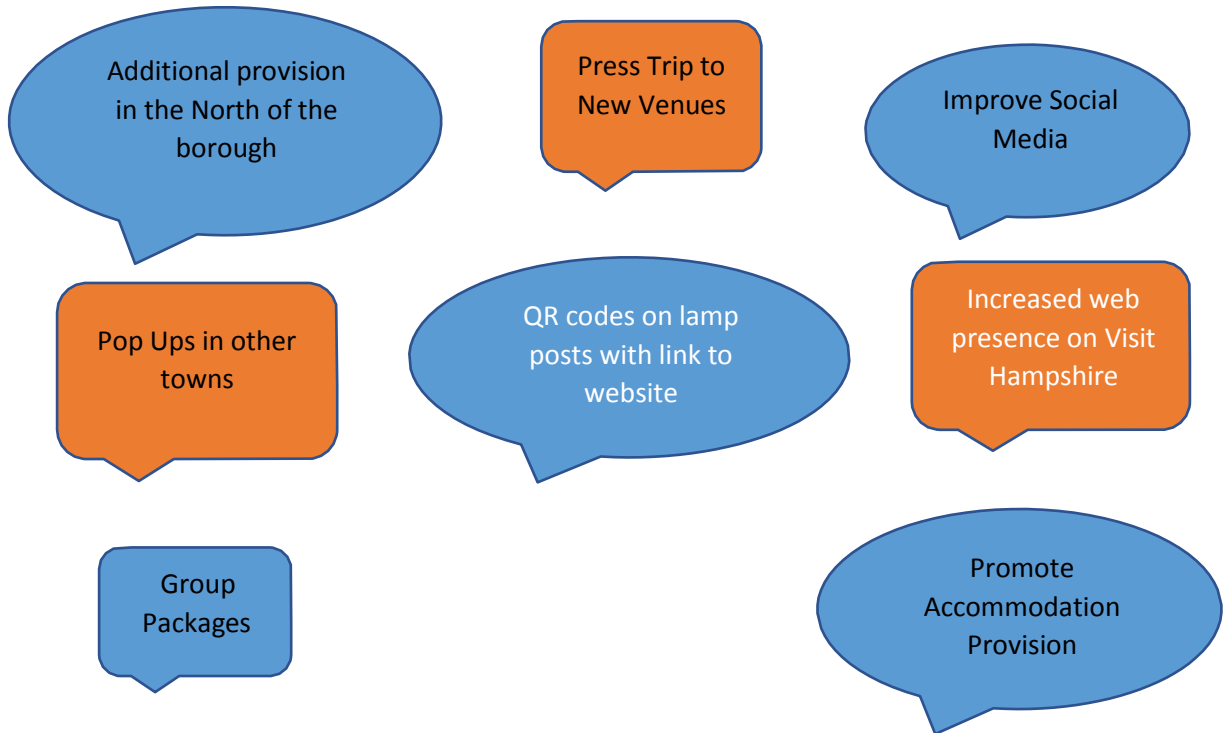
This was an open question, with most receiving just one response. The most frequent suggestions were that the VIC should promote itself better to the local industry (4 mentions), and an increase in opening hours (2 mentions). One specific suggestion was an idea of the VIC promoting both itself and the local area to major local employers (John Lewis and Vodafone were the examples) which would be a stimulus to the visiting friends and family market.

Suggestions for Improvement (No of respondents)



Question 5: New Services

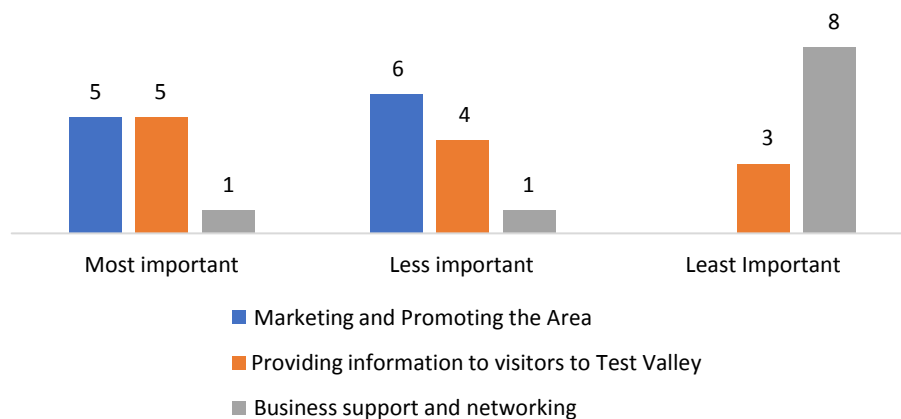
Respondents were asked to make suggestions for activity that the tourism/VIC service could develop. There was some overlap with the previous question and the anticipated issues around the north and south of the borough did come up in both areas. There was one of each suggestion which are provided verbatim below.



Question 6 - Relative importance of three primary activities

Marketing and promoting the Test Valley was the primary activity of the VIC service, followed by providing information to visitor. Business support and networking was the least important element among businesses.

Importance of Primary VIC Activities
(no of responses)



Question 7: Anything else?

Respondents were given an opportunity to mention anything else they wished. This resulted in a series of complimentary remarks regarding the VIC and one concern raised about the impact of Airbnb.

The Romsey Visitor Information Centre does a wonderful job supporting all organisations that stage events in Romsey this is in addition to the vital role in supporting visitors to the town. Staff are friendly, helpful and enthusiastic - they are a vital cog in the "Romsey Town Centre Machine"

I look forward to working with the Tourism and VIC service in the future.

The staff are brilliant. We are extremely lucky to have such a great VIC in Romsey. I deal with them on behalf of a number of local organisations, and the VIC support all of them to a very high standard.

Our business has been undermined by Airbnb which is unregulated. TVBC could usefully assess and monitor Airbnb in the district. Referrals to other B and B's are no longer effective due to website activity.

As mentioned, in the current climate, I think we are extremely fortunate to have such a pro-active, knowledgeable and friendly Tourism service in our area which I believe still has a valuable 'human' element to play in these times of what digital 'anonymity'. I believe it is a partnership between the Tourism Service and the businesses they represent that makes this successful for all involved. Well done to all involved.

We find the services offered by Romsey VIC to be invaluable to our organisation and many of our customers.

Appendix 4: Case Studies

Ryedale District Council

Description: Ryedale is in North Yorkshire, west of Scarborough and the coast and adjacent to York (which is to the south west). Principal towns include Helmsley, Malton, and Pickering. The three towns have their own distinct identities and offers.

Part of Ryedale lies within the North York Moors National Park. Its total surface area is 150,659 hectares, making it the largest district in North Yorkshire. The population of this primarily rural area is estimated at 54,920 in 2018.

As well as the North York Moors National Park, principal attractions include a cluster of ruined abbeys (Rievaulx and Byland) and Castle Howard. Pickering is one of the terminal stations for the North Yorkshire Moors Steam Railway. Malton, via an initiative led by local landowners and a town-based Community Interest Company (CIC) has built a reputation as ‘Yorkshire’s Food Capital’ with an event-led programme.

Tourism contributes at least £318 million to the Ryedale economy each year supporting 7,550 jobs, 31% of the working age population (Source: [Cambridge Model 2018-TSE](#)). Strong growth was recorded in both volume (4%) and value (9%) of tourism in 2018.

The way that tourism is managed and promoted in Ryedale has been the subject of radical change in the last five years. In 2017 the council took the decision to cut its tourism service entirely. During the next two years, businesses largely gravitated to either the North York Moors National Park, Scarborough Borough Council or VisitYork Destination Management Organisations for support, depending on location or market fit. In late 2019 a dedicated tourism development officer was recruited in the Economic Development Team of the council. The postholder is the same individual who was made redundant in 2017 and therefore able to offer valuable insight into the former, and new approaches.

Prior to 2017 the council’s approach was not unlike Test Valley’s, with a ‘commissioning’ approach designed to promote Ryedale as a destination brand within an overall North Yorkshire or North York Moors brand, particularly looking to generate traffic to the destination website. The new approach is a more focussed ‘business development’ one, helping businesses to market themselves better and looking to identify and plug the identified gaps in the provision to tourism businesses. The council’s [website](#) has been developed to focus on support to businesses. A specific initiative is the development of a ‘Ryedale’ toolkit for businesses with high quality images and suggested copy for inclusion in their own marketing activity.

The council has published a defined role as:

The role of the District Council is to promote Ryedale as a visitor destination and supporting businesses in this sector to raise spend per visitor. We do this in the following ways:

- *Facilitating visitor expenditure by maximising economic impact through increasing the value of each visit, and encouraging additional visits particularly at shoulder and off-peak times*
- *Maximise visitor satisfaction, before, during and after their visit*

- *Increase business profitability through improvements to quality, skills and innovation*
- *Ensure tourism is managed in a sustainable way that safeguards and enhances the environment and benefits the local communities.*

Activity focuses on research, business support and product development. This is based partly on a recognition that the rise of 3rd party information sources, review sites, online travel agents etc has diminished the role of the ‘official’ destination marketing and information provision.

Public resources are therefore better invested elsewhere. This does not preclude any destination marketing and the council is keen to leverage investment made by partners such as Visit York’s ‘York & Beyond’ campaign. The campaign is seeking to extend the average length of stay in York by promoting surrounding areas. A revenue budget of £45,000 is available so partnerships are essential to maximise investment. The best partners are proactively identified and approached to identify receptiveness to joint working and consider mutual benefits. The North York Moors National Park Authority is a potential partner in promoting outdoor recreation.

There are well developed business groups in the District based around the three main towns and part of the District’s programme is to get these to work together to avoid duplication of effort and unnecessary competition.

With regard to VICs, Ryedale currently has no provision but there is a provision of Tourist Information Points across the area – i.e. displays and leaflet racks provided at 3rd party outlets. At one time there were three VICs with Pickering was the last to close during 2015. The closure followed an unsuccessful attempt to run the VIC on a commercial basis.

Ryedale is currently consulting on [a destination development plan](#), looking at a variety of areas including product themes, marketing, events, seasonality, collaborations and partnerships.

There are a large number of agencies with an involvement in tourism in Ryedale including:

- East Riding County Council and Visit Hull & East Yorkshire
- Howardian Hills Area of Outstanding Natural Beauty
- North York Moors National Park Authority & North York Moors Tourism Network
- Scarborough Borough Council
- Tourism Association North Yorkshire
- Visit York
- Welcome to Yorkshire.

Whilst this could be seen as confusing, it does provide a large number of partners for the council to collaborate with. The council also provides summary information on the role of each of these organisations on its website.

There are significant similarities to Test Valley including:

- The presence of three distinct towns with their own identities, business networks and aspirations with the council facilitating a broader destination partnership approach
- The proximity of the national park (North York Moors/South Downs) and ‘honeypot’ heritage cities (York vs. Winchester/Salisbury)
- Similar proximity to better known areas e.g. New Forest and Scarborough/Whitby
- A ‘market facing’ rather than ‘product led’ approach to destination branding

However, the district council's approach to supporting tourism businesses is radically different from Test Valley's. There is a more direct approach to working with businesses and helping them to market themselves better when working with other agencies. This contrasts with the commissioning of services from agents and DMO's to deliver destination 'brand awareness' and visitor services, whilst facilitating networks and business relationships in a more informal manner, as delivered in Test Valley.

Warwickshire

It had initially been hoped to include some of the Warwickshire districts in the online survey and as potential case studies. Due to recent staff changes across a number of districts, meaning many officers had only been in post a number of weeks, this was not possible. A one to one conversation with the County's Head of Tourism provided useful insights. Warwickshire was seen as broadly comparable with Hampshire, containing some large conurbations, 'honeypot' destinations (e.g. Stratford/Winchester) and smaller, less developed rural areas. Warwickshire has five districts: North Warwickshire, Nuneaton and Bedworth, Rugby, Stratford, and Warwick. Tourism is strongest in the South of the County (Stratford & Warwick).

As with the online survey, VIC provision varies enormously, with some directly owned and managed VIC's, some partnership operations, some stand alone and some jointly located. North Warwickshire, Nuneaton and Bedworth have no VIC's, Leamington's is based in the Pump Rooms theatre with the Box Office and Rugby's is in the local Art Gallery. The Warwick VIC is co-funded with £20,000 support from the district to the town council, who manage the facility.

Appendix 5: Consultees list

Name	Organisation
Meeting and Conversations	
David Gleave	Test Valley Borough Council
Jayne Mills	Test Valley Borough Council
Graham Smith	Test Valley Borough Council
Alex Holmes	Warwickshire County Council
Andrew Bateman	Hampshire County Council
Teresa O'Kelly	Tourism South East
Julia West	Tourism South East
David Andrews	Visit Wiltshire
Rob Griffiths	Paultons Park
Craig Nattress	Ryedale Borough Council
Rachel Shimmell	Rachel Shimmell PR
Jo Andrews	The Marketing Collective
Rachel Gander	Winchester City Council
Andrew Gostelow	Winchester City Council
Ieuan Wathen (and Board)	Romsey Chamber of Commerce
Visitor Information Survey	
Liz Healey	Warwick Visitor Information Centre
Mary Sewell	Medway council
Lisa Powell	Thanet District Council
Luzia Norman	VisitBrighton
Jane Singh	Visit Portsmouth / PCC
Tom Pridmore	Ribble Valley Borough Council
Charlie Thornton	Eden District Council
Local Industry Survey	
Stewart	The Greenwoods Bed and Breakfast
Caroline Stevens	Danebury Vineyards
Mark Miller	Three Rivers Community Rail Officer
Anthea Hughes	Ranvilles B&B
Sharon Conduct	The Star Inn
Peter Speirs	Romsey Chamber of Commerce
Elizabeth Wagner	Romsey Abbey/Romsey Festival/Music in Romsey
Richard Hewett	Friends of Romsey Signal Box
Heather Whittam	The Lights
Simon Henderson	Grosvenor Hotel
Rosie Lowry	Yew Cottage Bed and Breakfast
Rob Griffiths	Paultons Park
Tracy Randall	Sir Harold Hillier Gardens
Alan Rimmer	Plaza Theatre

Name	Organisation
January Workshop	
Steve Godwin	Andover BID
Caroline Stevens	Danebury Vineyards
Dr Judy Bennett	Romsey Future
Mark Edgerley	Romsey Town Centre Manager
Emily Wilkinson	Social You/Stockbridge Business Association
Gerald Dodson	Stockbridge Business Association
Councillor David Drew	Test Valley Borough Council
Councillor Dorothy Baverstock	Test Valley Borough Council
David Gleave	Test Valley Borough Council
Jayne Mills	Test Valley Borough Council
Graham Smith	Test Valley Borough Council
February Workshop	
Caroline Stevens	Danebury Vineyards
Richard Hewett	Friends of Romsey Signal Box
Lucy Townsend	Grosvenor Hotel
Chris Bowry	Hampshire County Council
Rob Griffiths	Paultons Park
Elizabeth Wagner	Romsey Abbey
Judy Bennett	Romsey Future
Mark Edgerley	Romsey Town Centre Manager
Clare Goddard	Sir Harold Hillier Gardens
Tracy Randall	Sir Harold Hillier Gardens
Emily Wilkinson	Social You
Catherine Lee	Solent University
Andrew Ferrier	Test Valley Borough Council
Cllr Christopher Ecclestone	Test Valley Borough Council
Cllr David Coole	Test Valley Borough Council
Cllr David Drew	Test Valley Borough Council
Cllr Iris Andersen	Test Valley Borough Council
Cllr John Parker	Test Valley Borough Council
Cllr Karen Hamilton	Test Valley Borough Council
Cllr Maureen Flood	Test Valley Borough Council
Cllr Nick Lodge	Test Valley Borough Council
Cllr Phil North	Test Valley Borough Council
Cllr Rebecca Meyer	Test Valley Borough Council
Cllr Richard Rowles	Test Valley Borough Council
Cllr Tony Burley	Test Valley Borough Council
David Gleave	Test Valley Borough Council
Graham Smith	Test Valley Borough Council
Jayne Mills	Test Valley Borough Council

Name	Organisation
Louise Batson	Test Valley Borough Council
Lucy Johnson	The Army Flying Museum
Jan Greep	The Grosvenor Hotel
Peter Colling	Tourism South East