

ipswich tourism strategy to 2010



one-ipswich



IPSWICH

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introduction

Tourism is an extremely important and growing sector of the local economy. According to the East of England Tourist Board, the overall value of tourism to Ipswich in 2000 was an estimated £123.9 million. Of this total, £33.4 million was generated by staying visitors and £90.5 million by day visitors. What this means to the town is that 3,884 actual jobs are supported, significant not only in terms of job creation and retention, but also in the fact that the resulting salaries and expenditure are multiplied through the economy.

It is not always appreciated that local residents also benefit from the growth of tourism by being able to use facilities and attractions which are only viable because of the influx of visitors. Spending on the conservation of Ipswich's historic buildings is also encouraged by the generation of additional income.

Tourism also has a role to play in raising the profile of Ipswich nationally and internationally, benefiting businesses operating in other key sectors.

Ipswich has been developing over many years now as a multi-cultural society, demonstrated by the town's many different ethnic restaurants and participation in the new Ip-art festival. For example, the Ipswich Community Carnival can be seen as a celebration of all the town's ethnic groups. The growth of such summer events will inevitably bring an increase in the number of visitors to the town.

Recent research funded by the East of England Development Agency recognised the transformation of Ipswich over recent years, so much so that there is every reason for it to be a significant tourist destination. There remains much work to be done but I hope that everyone who will read this tourism strategy will share our vision for the development of tourism in Ipswich, a major urban centre for tourism by the year 2010.



Councillor Richard Atkins
Portfolio Holder, Planning &
Economic Development

Councillor Richard Atkins,
Portfolio Holder,
Planning & Economic Development
Ipswich Borough Council

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strategy



PART 1

preparing the strategy



1. BACKGROUND

The preparation of the Ipswich Tourism Strategy to 2010 comes at a particularly significant time for the town, its businesses and its residents.

- Proposals for the Waterfront and Ipswich Village as set out in the Ipswich First Deposit Draft Local Plan (2001) and the IP-One Area Action Plan (2004), will have an immense impact on the focus of future tourism in the Borough.

- In economic terms, tourism is now nationally one of the 5 largest industries in the UK, contributing over 6% of the nation's GDP and employing almost 7% of the workforce. In addition, one of the few positive impacts of the 2001 foot and mouth outbreak has been to focus government and public attention on the true significance of tourism to the economy.

- The growing awareness of the IP-City initiative, helps position Ipswich as a vibrant location for tourism, entertainment and shopping as well as business. The potential synergy between the IP-City campaign and Ipswich destination marketing brings important benefits to both initiatives.

In short, the opportunity to grow tourism in Ipswich has real economic potential.

Throughout, the Strategy recognises that it is only through the combined efforts of many of Ipswich Borough Council's Service Areas and the range of private and public partners involved, that plans to develop tourism can be evolved and implemented.

The strategy acknowledges the primary aim of the local strategic partnership, one-ipswich, to enhance the social, economic and environmental well-being of the town. In particular, links with the themes of culture & learning and economy & regeneration are

seen as essential to the future development of the tourism sector.

As a result, the strategy recognises the overarching roles of the emerging Cultural Strategy and the 2003 - 2010 Economic Development Strategy, of which it is an integral part.

In addition, a broad consultation process within both the private and public sectors has been undertaken to help guide the strategic plan.

The Tourism Strategy also builds on many of the themes of Ipswich Borough Council's Corporate Plan 'Taking Ipswich Forward' including:

■ Prosperous Ipswich

GOAL We will work with business to encourage new investment, innovation, learning and sustainable growth and employment.

AIM Raise the profile of Ipswich as an investment, tourist, shopping and cultural centre at local, regional, national and international levels.

AIM Continuously improve the quality of the workforce locally through training and development and through the provision of other learning opportunities.

■ Clean and attractive Ipswich

GOAL We will make Ipswich a cleaner and more attractive place to live, work and visit.

AIM Encourage residents, visitors, businesses and landowners to value the environment through education, campaigning and enforcement.

■ Protecting Ipswich

GOAL Now and in the future, we will understand, enrich and protect our natural, historic, cultural and built environments.

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AIM Protect and enhance the town's historic buildings ... and safeguard our cultural assets.

■ Enjoyable Ipswich

GOAL We will ensure that there is a comprehensive range of leisure and cultural opportunities for all people who live in and visit Ipswich.

AIM Promote Ipswich as a regional centre for leisure and cultural activity.

As the county town and gateway to Suffolk, the Borough has always worked across its administrative boundaries. Ipswich as a tourist destination cannot be viewed in isolation from the rest of Suffolk. As such, this strategy works alongside the Suffolk Development Agency in its role to promote tourism in Suffolk. On a wider level, it also works alongside EEDA and the East of England Tourist Board, the delivery partner in the East of England region for 'VisitBritain', the national body established in April 2003 to market Britain overseas and England within the UK. In this way a joint effort is achieved, developing tourism in Ipswich and the rest of the region, through mutually advantageous co-operation.

"The EETB welcomes the recognition that successful implementation requires the involvement of partners outside the Borough Council, as this mirrors the approach to the regional strategy. There is a broad agreement with the overall objectives"

Comment from consultation with East of England Tourist Board.

2. MARKET ANALYSIS

2.1 THE NEED FOR DESTINATION MARKETING

The following extract from the Strategy for Developing Tourism in the East of England 2000 - 2010, is a salient reminder that tourism is a market that needs constant focus and attention, if the

benefits that can be derived from it are to be maximised.

"While overall tourism activity increases and the western world increasingly perceives holidays as 'an essential', competition from an ever expanding range of destinations will mean that established destinations will not benefit automatically from this growth. As consumer expectations rise, it will be essential to develop and promote ever more attractive tourism products and experiences if the opportunities are to be grasped."

2.2 UK, SUFFOLK AND IPSWICH TOURISM TRENDS

A review of current trends in the UK and regional tourism markets suggests 8 specific conclusions which have a strong influence on the development of the Ipswich Tourism Strategy.

(1) The growth recorded in the UK's tourism market between 1994 and 1998 offers real potential for the development of tourism in Ipswich. This potential can be realised if the Ipswich and wider Suffolk 'product' can be made to offer a genuine appeal to our target audiences.

(2) The strongest areas of UK tourism growth, the 45-65 age group and the short break sector are a natural target for Ipswich and for the wider Suffolk region outside the popular coastal resorts.

(3) The presentation of the 'Ipswich product', should take advantage of the growth in 'activity' and 'interest' based holidays. It should also aim to appeal to a 'cash rich, time poor' lifestyle, which has placed an emphasis on easy to arrange short breaks combining both accommodation and leisure pursuits.

(4) In 1997 the business market accounted for 12% of trips to Ipswich and 29% of tourism spend. In the

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expanding Ipswich economy, the business market offers both opportunities for growth and for return leisure visits to the area.

(5) 'Visits to Friends and Relatives' (VFR) in the Ipswich area accounts for some 41% of trips and 20% of spend (Ipswich Borough Economic Impact of Tourism 1998). It is important that this VFR sector plays an integral part within the Strategy.

(6) Perceptions of Ipswich and Suffolk as tourist destinations are improving; the combined efforts of all involved in tourism in the county can have a real impact on the profile and appeal of the area.

(7) Geographically, the core target market comes from London, the South East, the East Midlands and the wider East of England region

(8) The importance of the day visitor market must be recognised in the strategy by working closely with the relevant partner organisations

3. WHAT HAS BEEN ACHIEVED SO FAR

3.1 IPSWICH? YOU'D BE SURPRISED

A four year Destination Marketing Campaign, funded jointly by Ipswich Borough Council, Suffolk County Council and the Ipswich & District Hotels Association, was implemented in 1999 promoting short break holidays to the 'empty nester' market. It has now been in existence for 5 years.

Taking into account the relatively low profile of Ipswich as a tourist destination and the fact that Ipswich has no single architectural or geographic focus, it was recognised that the campaign should not attempt to promote one aspect of Ipswich but rather an array of attractions. These were brought together under the banner:-



The wording of the banner was designed to challenge people's perception of Ipswich.

Over the five-year campaign a series of media have been employed effectively.

In Year 1 direct mail targeted at 'empty nesters' in the Greater London area generated a response of over 10%, requesting further information. Follow-up research amongst these respondents demonstrated both a positive attitude towards Ipswich and a high likelihood of booking a short break.

In Year 2 those who had responded to the direct mail received a second mailing including the 2000 Ipswich and District Guide. A web site www.visit-ipswich.com was also launched to maximise the cost effective exposure of the campaign message and to link directly the promotion of the Ipswich area with details of the accommodation available. By June 2002 over 1,000 visits per month were being recorded in the "Where to stay" section of the site.

In Year 3 a public relations campaign was introduced. At the same time, the principle of partnership, embodied in the joint work with the Ipswich and District Hotels Association, was extended to a broad section of organisations which influence the tourism market. Activities included:-

- Working with the Suffolk Tourism Forum (local authorities in the county) to co-ordinate promotion across Suffolk and create a Suffolk Brand
- Specific projects with conference venues in the Ipswich area, including the creation of a privately funded Ipswich Conference Pack, promoting Ipswich as a conference venue to businesses in the South East, Greater London and the East of England.
- Joint activities with the National Trust, creating the link between the opening of the new Sutton Hoo Visitors' Centre with Ipswich's Anglo-Saxon Heritage. This venture encourages visitors to Sutton Hoo to stay in the Ipswich area.

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• Discussions with the town centre Ipswich Partnership and Ipswich Town Football Club. These activities were continued into Year 4 when 'Ipswich Heritage Breaks' were launched. The campaign, part sponsored by Anglia Railways, firmly positioned Ipswich in the heritage sector and was publicised through direct mail, leaflet distribution and public relations activities.

The results of these activities (detailed further in Appendix 2) provide a firm foundation on which the new Strategy can be built.

It should be noted that at the end of Year 5, the Suffolk Development Agency introduced a new Suffolk branding - see page 20 for details.

4. TARGET MARKETS

4.1 CORE TARGET - THE SHORT BREAK, EMPTY NESTER MARKET

The appeal of Ipswich is not restricted to any specific target group, however, for the marketing of Ipswich tourism to be effective it is essential that it is focused.

The short break, empty nester market will remain the central focus of marketing activities. This 40 plus age group sector, independent of children and in the habit of taking short UK breaks, has been at the heart of the Destination Marketing Campaign.

The empty nester market is the natural target for non-coastal destinations in Suffolk (Strategy for Developing Tourism in the East of England 2000 - 2010)

It has also been validated by research into the 'Ipswich you'd be surprised' campaign (Ipswich Borough Tourism & Marketing Best Value Service Review. Jan 2001) which confirmed the match between the empty nester market and the Ipswich product.

4.2 THE OVERSEAS MARKET

With only 7% of overseas tourist spend in the East of England region, Suffolk as a county is far from gaining its fair share of what could be a lucrative tourist market.

Within Ipswich's Tourism Strategy the overseas market has to be placed at a lower priority than the domestic sector which offers the greatest potential. Support will continue to be given to the East of England Tourist Board's "PROMPT" partnership which represents the Borough in the overseas sector.

In addition, work with the Haven Gateway Partnership will bring in more tourists, especially from Belgium, Holland, Germany and Denmark, by developing the cruise business into Harwich, installing information kiosks on the ferries and through other initiatives.

The town's links with Arras in northern France are developing, with increasing numbers of visitors in both directions, in no small part due to the work of the Ipswich Arras Association.

4.3 VISITS TO FRIENDS AND RELATIVES SECTOR

Considering the size of this visitor sector, it has perhaps been given too little consideration in the past.

The most recent research into the perceptions of Suffolk (Commissioned by the Suffolk Tourism Forum in the development and testing of the Suffolk Brand 2001) confirms that while the county has a low profile amongst those who have not experienced it, visitors develop an increasing affection for the area.

In this context visitors to friends and relatives can become missionaries, spreading the news of the appeal of the area. Tactical plans will ensure that, where relevant, the friends and relations sector will be informed of the programmes developed for the core empty nester target market.

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4.4 THE BUSINESS SECTOR

As the major contributor to accommodation room occupancy, the business sector and specifically those who fall into the empty nester target market, represents a genuine target audience for return leisure based visits.

In addition, as a 'captive market' whilst staying in Ipswich on business this sector is relatively easy to reach and will be addressed by specific tactical plans.

4.5 THE CONFERENCE SECTOR

The concentration of accommodation in Ipswich, compared with the remainder of the county, provides an additional role for the town to play within the wider Suffolk area.

Direct approaches will continue to be made to the conference and meetings market.

4.6 DAY VISITORS

Day visitors to Ipswich far outweigh staying visits (73% of total in terms of expenditure generated in 2000), although almost three-quarters of this expenditure was in retail and catering outlets rather than attractions.

These day visitors are made up of non-local tourist trips i.e. lasting 3 hours or more but taken on an irregular basis, as well as residents of Ipswich itself.

Expenditure by residents is important to attractions and the IAG, working with the TIC, will be encouraged to increase the volume of expenditure from this sector.

4.7 THE GROUP TRAVEL SECTOR (COACH TRIPS)

The availability of large hotels, particularly at weekends, makes Ipswich the ideal base for touring Suffolk by the group travel market.

Promotion to the empty nester market within the group travel sector will play a specific role within the Strategy.

4.8 UNIVERSITY

Plans to make Ipswich a university town will bring great benefits to the local economy. An estimated 5,000 (FTEs) Higher Education students by the year 2011 and a final target of 7,500 will inevitably bring significantly increased levels of business in many areas, for example patronage of leisure facilities, day trips to visit students and conferences.

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Ipswich
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the strategy



1. STRATEGIC VISION FOR TOURISM

The following vision, for the development of tourism in Ipswich by the year 2010 has been placed at the heart of this Strategy:-

To have established Ipswich as one of the East of England's leading urban tourist centres and to have maximised the advantages this brings to the town.

In achieving the vision, the Strategy seeks to ensure that the advantages tourism brings to Ipswich are sustainable and play their part in benefiting the Ipswich economy, Ipswich businesses and Ipswich residents.

Sustainable: As defined in the East of England Tourist Board's "Strategy for Developing Tourism in the East of England 2000 - 2010", encouraging the sustainable growth of tourism means maximising the benefits to the visitor, tourism industry, environment and host communities while minimising the problems. In this context, the Ipswich Tourism Strategy looks to the longer term, whilst at the same time taking advantage of short-term tactical opportunities, which complement the longer-term goals.

Economy: A key strategic goal is the generation and protection of wealth and jobs in the Ipswich area. The success of Ipswich as a tourist destination, however, has an effect beyond the generation of tourism income. It is vital to the self-image and confidence of the town, which impacts on Ipswich as a place to invest and do business, as well as a place to visit as a tourist.

Businesses: The Strategy naturally focuses on the businesses directly related to tourism, in particular accommodation, attractions and entertainment providers. Assisting new business start-ups and fostering growth and investment in the tourism arena, are critical. Working with businesses indirectly

related to tourism, such as retail and service providers, is also vital. Co-operation and partnership with the wider business arena brings joint benefits and potentially an increased source of funds to invest in tourism development.

Residents: The Strategy acts as a driver to improve facilities and opportunities for both visitors and residents alike. Residents can gain much from improvements in the tourism infrastructure. Residents also have a direct influence on the tourism market. Visits to friends and relatives generate the largest volume of domestic tourism trips to the East of England Region accounting for 32% of trips and 12% of spend. (Strategy for Developing Tourism in the East of England 2000 - 2010).

2. ACHIEVING THE VISION

Following a period of broad consultation, four strategic objectives have been set to achieve our strategic vision:

- 1) To position Ipswich as one of the East of England's leading heritage based tourist destinations, by bringing together the developing Ipswich Waterfront and other heritage sites in and around the town.
- 2) To promote the distinct advantages of Ipswich as an urban tourist centre and base for the visitor to Suffolk.
- 3) To create and develop partnerships in conjunction with public and private sector groups, thereby maximising the tourism potential of Ipswich, the wider Suffolk County and the Haven Gateway.
- 4) To encourage a programme of continuous improvement in the quality of all aspects of the Ipswich tourism product.

The tactics for implementing the Strategy have been produced as a supplement to this document.



OBJECTIVE 1

To position Ipswich as one of the East of England's leading heritage based tourist destinations, by bringing together the developing Ipswich Waterfront and other heritage sites in and around the town.

THE SIGNIFICANCE OF IPSWICH WATERFRONT REGENERATION

The regeneration of the Waterfront has the potential to have an overriding effect on the future development of Ipswich as a tourist destination.

Just as in cities such as Gloucester and Bristol, the Waterfront area can provide a central focus, which to date has been lacking, on which the image of the town can potentially be built.

The opening of the Salthouse Harbour Hotel (summer 2003) on the Waterfront is a sure sign of private sector confidence in the future of the Waterfront as a tourist destination.

The Ipswich Waterfront has the region's best positioned marinas for sea-borne visits due to its proximity to the town centre. Furthermore, the potential offered by the Waterfront as a focal point for marketing activity is increased by:-

- Ipswich's deep-rooted maritime heritage, one that has genuine relevance and interest to both the domestic and international market.
- The location of the Waterfront within easy walking distance of the town centre and its major shopping and entertainment areas.
- The combined attraction of the Waterfront and maritime landmarks, which can be found throughout the town and in the River Orwell estuary, which is recognised as one of the most scenically beautiful in the country.

This potential was overwhelmingly endorsed by those involved in the consultation process, although it was widely accepted that as yet the facilities for tourists on the Waterfront are not sufficiently developed to make the area a dominant tourism venue. In particular, there is the need for a substantial car parking provision in the vicinity of the Waterfront. It was, however, agreed the Waterfront should be central to the future development of the Ipswich tourism product.

■ Comments from the consultation process.

"The EETB agrees with the need for tourism to be a key factor in decisions relating to the area's development. Of particular importance is the need to improve the foot access between the dock and town centre."

EAST OF ENGLAND TOURIST BOARD

"The Borough must strive to achieve a balance between residential, office, retail and heritage/tourism interests."

IPSWICH & DISTRICT HOTELS ASSOCIATION

"There is a need to get tourism higher on the Waterfront agenda.... this is the single most important objective for the new tourism strategy."

STAKEHOLDER COMMENT FROM CONSULTATION WORKSHOP

IPSWICH AS A HERITAGE CENTRE

The Ipswich Waterfront and the Orwell Lady River Cruises, Christchurch Mansion, Ancient House, Wolsey Gateway, Ipswich Museum and the Transport Museum are just some of the highlights that make up Ipswich's heritage.

The Blue Badge Guides are excellent in bringing the past to life with their comprehensive range of walks. Informative town trails are available from the Tourist Information Centre, based in a beautiful

the strategy



medieval Church. In fact, Ipswich possesses 12 medieval churches and over 660 listed buildings from all periods of English history. The town also boasts many fine parks and a country park beside the beautiful River Orwell.

Just as importantly, the town provides the base from which to explore the wide choice of Suffolk based heritage sites, including Constable Country, Orford and Framlingham Castles, the Wool Towns, the new National Trust Visitors' Centre at Sutton Hoo and the Suffolk Heritage Coast.

Heritage has long been central to Ipswich's Tourism Strategy and will be promoted as an integral part of the Ipswich tourism product.

OBJECTIVE 2

To promote the distinct advantages of Ipswich as an urban tourist centre and base for the visitor to Suffolk.

Ipswich offers the visitor to Suffolk the distinct choice of a town or a country based break.

The town offers the advantages of a wide selection of hotel and bed and breakfast accommodation. Its hotel accommodation base makes it the prime location for group travel and conferences in Suffolk as well as leisure visits. In order to sustain tourism growth, there must be sufficient accommodation capacity across the price and quality range. There is particular concern over the apparent decline of quality bed & breakfast establishments.

In the entertainment arena, the development of Cardinal Park has acted as a catalyst to launch Ipswich as one of East Anglia's major entertainment centres. The combination of youth oriented clubs and pubs, 2 multi-screen cinema complexes, the re-opened New Wolsey Theatre, the Corn Exchange and Regent Theatre venues, the Wolsey Art Gallery, plus an extensive choice of restaurants and eating places is broad ranging in its appeal.

The successful Ip-art festival, launched in June/July 2003, has significantly expanded the number of summer events which attract tourists to Ipswich, as well as celebrating the town's diverse culture.

Ipswich is a major centre for sports activities including golf and yachting. Ipswich Town Football Club's reputation for attractive football and the development of the stadium, further enhance the sport and entertainment product.

Together, the concentration of entertainment venues in Ipswich and the lively night time scene add a distinctive 'urban' feature to the overall appeal of Suffolk as a tourist destination.

Ipswich is a regional shopping centre with 2 major shopping malls, pedestrianised streets, an open market and all the national chain stores as well as small individual shops. In the past, the importance of the open-air market has been underestimated and it should be extended to become a feature of the town. With many cafes and restaurants to choose from, convenient car parks and three park and ride operations, shopping will continue as an important part of the attraction of Ipswich for both day visits and holiday breaks.

The enhancement of the facilities and services offered by the town and its promotion are prerequisites to the achievement of the Tourism Strategy.

■ Comments from the consultation process.

"Ipswich can genuinely be promoted as being alive at night."

"Ipswich is lean on specialist shops, those that do exist need to be collectively marketed."

"Regular comments are received from visitors to the TIC suggesting improvements to toilet facilities, left luggage facilities and signs."



OBJECTIVE 3

To create and develop partnerships in conjunction with public and private sector groups, thereby maximising the tourism potential of Ipswich, the wider Suffolk County and the Haven Gateway.

IPSWICH WITHIN A SUFFOLK CONTEXT

Ipswich tourism cannot be viewed in isolation. The town is well situated as a base from which to explore the region, combining the benefits of good accommodation, entertainment and its own heritage sites with the attractions offered by the surrounding area. It is also a tourist destination in itself, attracting visits from tourists choosing to stay in the Suffolk and north east Essex countryside.

Many of those involved in the consultation process, urged that Ipswich should be viewed in the context of the wider appeal of Suffolk as a whole. This approach is central to the new strategy. The development of tourism in Ipswich is viewed alongside, and as part of, the development of tourism within the county, working closely with the full range of partners within the Suffolk Development Agency's Suffolk Tourism Partnership.

In addition, Ipswich has helped to develop the Haven Gateway Partnership, a public/private sector partnership designed to promote inward investment, including tourism, to the Ipswich, Harwich and Felixstowe Ports and surrounding areas.

■ Comment from the consultation process.

"There must be a consistency in messages and association between Ipswich and the 'bigger picture' of Suffolk."

POWERGEN

PARTNERSHIPS WITH ACCOMMODATION PROVIDERS AND ATTRACTIONS

Ipswich Borough Council has been one of the driving forces behind the development and implementation of a destination marketing campaign, jointly funded by Ipswich Borough Council, Suffolk County Council and the Ipswich & District Hotels Association (IDHA).

The strategy endorses this joint activity and encourages the development of wider based partnerships in the future, forging close links between those who provide accommodation and those who deliver entertainment and attractions for Ipswich's visitors, represented by the Ipswich Attractions Group (IAG). Further partnership activities are planned with both the National Trust and English Heritage as the owners of the major heritage sites in the region.

By working together, attractive short breaks and longer stay holidays can be developed to the benefit of all involved in tourism.

OBJECTIVE 4

To encourage a programme of continuous improvement in the quality of all aspects of the Ipswich tourism product

IMPROVING THE QUALITY OF THE IPSWICH TOURISM PRODUCT

A process of continuous quality improvement is essential to the strategy, as the facilities for Ipswich visitors develop.

The strategy supports the drive initiated by the town centre Ipswich Partnership to improve public facilities within the town centre. The quality of these facilities has a significant impact on the overall quality of the Ipswich tourism product.

In the accommodation sector, a formal quality accreditation scheme will be introduced working

the strategy

closely with our partners in the Ipswich & District Hotels Association.

Ease of movement around the town needs to be considered as a quality issue, both for disabled and able bodied people.

The Tourist Information Centre is also recognised as a key component of the Council's economic development activities. The high quality of its information and accommodation booking service, and its contribution towards the implementation of joint marketing activities, brochure production and quality accreditation schemes is critical to the delivery of the tourism strategy.

■ Comments from the consultation process.

"The EETB welcomes plans to switch to an inspected only policy."

EAST OF ENGLAND TOURIST BOARD

"Quality accreditation is a high priority but we need to work with non quality checked establishments rather than alienating them."

IPSWICH & DISTRICT HOTELS ASSOCIATION

the tourism market

1. MARKET TRENDS

The overall value of tourism to Ipswich in 2000 was an estimated £123.9 million. Of this £33.4 million was generated by staying visitors and £90.5 million by day visitors.

Traditionally, the inland areas of Suffolk, including Ipswich, are very firmly positioned as short break (1-3 nights) destinations by UK residents. In 2000, 93% of all staying holiday trips to Ipswich were by UK residents and of those trips, 71% were for short breaks. (EETB: The Economic Impact of Tourism in Ipswich Borough Council Area 2000).

It has now become usual for UK consumers, with adequate disposable income, to take a main holiday abroad, complemented by a number of UK holiday breaks. As a result, nationally, there has been a sustained decline in long holidays taken in the UK and a contrasting growth of short breaks.

Two further related markets have held up well in the Ipswich area:-

- Business tourism accounted for 19% of all staying trips in 2000 and 38% of spend.
- Visits to Friends and Relatives (VFR) accounted for 35% of staying visits although only 22% of spend.

(EETB: The Economic Impact of Tourism in Ipswich Borough Council Area 2000).

2. SOCIAL TRENDS

The growth in short holidays is mirrored by three strong social trends:-

- In demographic terms, the UK population is ageing with a particular growth in the 45 -64 age group. This group has a propensity for taking frequent holidays, with an emphasis on second holidays and short breaks taken throughout the year.
- Life style trends show that technological advances have been translated into greater productivity rather than increased leisure time. Between 1971 and 1996 it is estimated that while leisure time increased by only 5%, leisure spending rose by 89%. Again this has placed an emphasis on short breaks and on easy to arrange short break packages combining both accommodation and leisure pursuits.
- Along with the growth in the short break sector, activity based holidays have also become more popular. These include 'health' based activities, hobby based activities and 'heritage' focused breaks.

These trends have a profound impact on the potential for tourism growth in Ipswich, and indeed Suffolk as a whole, where the primary product offering has a natural appeal to the older, short break sector.

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the tourism market

3. TOURISM IN THE EAST OF ENGLAND AND IPSWICH

Between 1994 and 1998 tourism in The East of England rose by 6% in trips, 5% in nights and 1% in terms of spending (a decline when inflation is taken into account).

Between 2000 and 2002 tourism in the East of England rose by 9% for trips, 11% for nights and 10% in terms of spending.

For the region as a whole, the make-up of the market in 2002 showed the dominance in spending terms of the long stay sector. This contrasts with Ipswich itself where, as defined above, the short stay sector provides the mainstay of spending.

Most UK tourists to the East of England (72% in total) live within a few hours of the region: 12% from the South East, 15% from London, 14% from the East Midlands and 31% from the region itself (UK Trade Statistics 1998). The relative proximity of

72% of UK visitors to the East of England has clear indications for defining the geographical target market for tourism in Ipswich.

With the close proximity of the target market, a critical 80% of all visitors to Ipswich are day, as opposed to overnight, visitors. Day visitors accounted in 2000 for £90.5 million of tourist spend, 73% of the total £123.9 million. This in turn has a critical impact on where tourist money is spent:-

Retail	40%
Catering	33%
Transport	11%
Attractions and entertainment	10%
Accommodation	6%

With these figures in mind, working closely with the organisations that support the retail and catering trade in Ipswich, and in particular the Ipswich Partnership, must be an important part of the Tourism Strategy.

Tourism in the East of England (2002) and Ipswich (2000) by staying visitors (from UK)

	East of England (2002)*		Ipswich (2000)**	
	Trips	Spend	Trips	Spend
	14.5m.	£1,704m.	297,000	£25.6m.
Short holidays	33%	30%	31%	22%
Long stay	21%	30%	12%	16%
VFR	34%	20%	35%	22%
Business	11%	19%	19%	38%
Other	1%	1%	3%	2%

* United Kingdom Tourism Survey 2002

** EETB: The Economic Impact of Tourism in Ipswich Borough Council Area 2000

the tourism market

4. PERCEPTIONS OF THE EAST OF ENGLAND AND IPSWICH

Recent work on an East of England tourism marketing strategy (The Tourism Network 2004) has drawn on research relating to perceptions of the region to define the East of England's competitive advantage with the following positive points:

- Wide open skies – giving a sense of freedom and escape
- Space – both in the coast and countryside, emotional space to think and a slower pace of life
- Local distinctiveness – the small details and differences between one place and another that can be so attractive to visitors
- Better weather – visitors increasingly appreciate that the sun shines more and it rains less than in other parts of England.

This positive message contrasts with earlier research on perceptions of the area (undertaken by MEW Research for the East of England Tourist Board in 1997).

The conclusions from ten focus groups in the Midlands and South East were largely negative:-

- The area is perceived as cold, wet and windy, and generally drab.

- Awareness beyond the seaside towns and Cambridge was low.
- The region was considered to have a low profile compared with other regions.
- Ipswich itself was set alongside Luton and Bedford as an unlikely place as a tourist destination.

More recent research, conducted in 2000 for the Suffolk Tourism Forum (a joint venture of the local authorities in the county) to support the development of the Suffolk Brand, reinforced many of these perceptions. The research, however, also emphasised a gulf in perception between those who know the Suffolk area - generally positive, and those who do not - low awareness and a lack of any real perception of the area.

This gulf, bridged by experience of the area, emphasises the importance of viewing all visitors, including the 'Visits to Friends and Relatives' and the business sector, as ambassadors for Ipswich and Suffolk.

It can also be suggested that continuing improvements to potential visitors' perceptions of Suffolk is one of the most important objectives facing the local industry.

APPENDIX 2

marketing activity to date

1. INTRODUCTION

Destination Marketing Campaign, jointly funded by Ipswich Borough Council, Suffolk County Council and the Ipswich & District Hotels Association, was implemented in 1999 promoting short break holidays to the 'empty nester' market.

2. IPSWICH? YOU'D BE SURPRISED

Taking into account the short break requirements of the target audience and the fact that Ipswich, unlike some other areas, has no single architectural or geographic focus, it was recognised that the campaign should not attempt to promote one aspect of Ipswich but rather an array of attractions.

It was also recognised that to deny the current perceptions of Ipswich would lack credibility. The campaign, as such, acknowledged existing perceptions as a means of providing the creative energy behind the campaign.

The resulting headline:- 'IPSWICH? You'd be surprised' provided the core message.

In year 1 of the campaign, direct mail was chosen as the key delivery medium:-

- It was selected as the most cost effective means of achieving a measurable response and tangible results
- Using a 'lifestyle list', the campaign accurately targeted 'empty nesters' in the Greater London area, aged 45 plus and known to be interested in taking short break holidays in the UK
- The above lifestyle list was merged with the East of England Tourist Board list of people in the Greater London area who had previously shown interest in breaks in East Anglia.

The mailing campaign proved that the creative solution had considerable power.

The 34,000 leaflets despatched generated a response of more than 10%, requesting further information. Follow-up research amongst these respondents demonstrated both a positive attitude towards Ipswich and a high likelihood of booking a short break.

3. WWW.VISIT-IPSWICH.COM

With confirmation that the 'IPSWICH? You'd be surprised' concept has a powerful impact, two specific activities extended the campaign, during year 2.

- Those who had responded to the direct mail received a second mailing including the 2000 Ipswich and District Guide
- A Web Site was built as a means to maximise the cost effective exposure of the campaign message.

The Web Site has proved to be:-

- Highly visual, providing an up to date view of Ipswich and all that is happening in the town.
- Readily promotable from other sites and from press advertising. Links are now established with a number of key sites and further links are being negotiated. A short-term 'small ad' campaign in the holiday pages of the national press also demonstrated the ability to promote visits to the site.
- Increasingly accessible to the empty nester target. It is estimated that in 5 years time 40% of hotel bookings will be made through the Internet

marketing activity to date

- A genuine service to hotels and guesthouses. Contributors to the site each receive their own page and a link, where appropriate, to their web site.
- Increasingly well used. By June 2003 more than 2,000 visits per month were being recorded in the "Where to stay" section .

4. PARTNERSHIPS

The principle of partnership, embodied in the joint work with the Ipswich and District Hotels Association, has been extended to a broad section of organisations which themselves influence the tourism market.

These include:-

- Working with the Suffolk Tourism Forum (local authorities in the county) to co-ordinate promotion across the county and create a Suffolk Brand.
- Working with the Suffolk Tourism Partnership (Suffolk Development Agency) and Suffolk Top Attractions.
- Initial successes with the Haven Gateway Partnership include the appointment of a Cruise Co-ordinator to develop Harwich as a port of call, as well as an ongoing investigation into the installation of information kiosks on board ferries crossing the North Sea.
- Specific projects with businesses that offer conference venues in the Ipswich area, including the creation of a privately funded Ipswich Conference Pack, mailed to businesses in the South East, Greater London and the East of England, promoting Ipswich as a conference venue.
- Recent joint activities with the National Trust. Aimed at creating the link between the opening of the new Sutton Hoo Visitors' Centre with Ipswich's

Anglo-Saxon Heritage, this venture encourages visitors to Sutton Hoo to stay in the Ipswich area to the benefit of hotels, guesthouses and bed and breakfast accommodation.

- Discussions with the Ipswich Partnership and Ipswich Town Football Club. about joint promotions.

5. PUBLIC RELATIONS

The appointment of a public relations consultant - PR Matters - who has strong credentials and editorial links in the tourism sector, was a significant addition to the Year 3 and 4 campaigns.

Public Relations objectives were set to:

- Widen awareness and improve perceptions of Ipswich and district as a visitor destination.
- Promote Ipswich and the surrounding area for short-break holidays.
- Encourage visits to the web site as a direct means of promoting the hotels and guesthouses in the IDHA.

Briefing articles have been despatched in a newly designed Ipswich Information Folder and the first press visits are now coming through. The impact of the PR campaign was planned to cover the Spring 2003 UK tourist market.

6. IPSWICH HERITAGE BREAKS

The 'Ipswich Heritage Breaks' campaign was launched in Year 4, 2002 - 2003, part sponsored by Anglia Railways. The campaign firmly positions Ipswich in the heritage sector and was publicised through direct mail, leaflet distribution and public relations activities.

Bringing together accommodation and access to

APPENDIX 2

marketing activity to date

local attractions, the campaign firmly positions Ipswich in the heritage sector. It was publicised through direct mail, leaflet distribution, public relations activities and the visit-ipswich web site which was enhanced to include new hotel pages, registration on the site, newsletters and redesigned home page.

7. TAKING THE DESTINATION MARKETING CAMPAIGN FORWARD

Due to the many successful initiatives of the Destination Marketing Campaign, it was agreed with the Ipswich & District Hotels Association to enter into a Year 5 campaign, 2003-2004. This included various elements:

- Continuing updating and maintenance of the visit-ipswich web site.
- Public relations initiatives.
- Encouragement of business visitors to return for short breaks.

- Regional press competitions targeting an increasing awareness of Ipswich as a short break destination.
- Hotel front-of-house training ("Talk Ipswich") to increase visitors' awareness of the tourist attractions in the area.

Sponsorship will again be sought to fund these activities.

It has been recognised that the Destination Marketing Campaign's banner: "Ipswich? You'd be surprised" needs to be refreshed after 5 years of use.

The work carried out by the SDA is pertinent here, with the creation of a new Suffolk brand to encompass both Suffolk inward investment and tourism requirements. A "Choose Suffolk" theme has been adopted, capable of being used for both rural areas and the urban situation, i.e. Ipswich. As an alternative, "Choose Ipswich" may be used where appropriate.