

APPENDIX (e)



## Report by Western Lake District Tourism Partnership (WLDTP)

Presentation to Steering Group - December 4<sup>th</sup>, 2006  
Report circulated prior to meeting

Report Title: Proposed Marketing Plan 2007/8

### 1. Purpose of report:

The purpose of this report is to make recommendations to the Steering Group on the type of marketing activity and market development work the Partnership should carry out in 2007/8.

### 2. Introduction

The strategy and constitution that is currently in place supports the following mission and vision for the Western Lake District Tourism Partnership (full details of the WLDTP in appendix 1):

- The primary aim of the *WLDTP* is
  - to market and promote tourism activities in the Western Lake District.
- Our secondary aims are:
  1. To assist in and encourage the development of high quality services in accommodation, attractions and retailing in the area and provide for them such marketing, advisory, research, information and support services as are affordable within the budget.
  2. Working with local authorities, Cumbria Tourism and other tourism initiatives and consortia in the furtherance of our aims.
  3. Communicating to the local community the importance of tourism to the economic, social, cultural and physical environment of residents.

The activities of the Partnership should therefore underpin these values and follow the core objectives of the Partnership Constitution, Service Level Agreement (SLA) document with both Council funders, and the Destination Management Plan (DMP) 06/07 (and subsequent 07/08 following Partner development in the New Year - see appendix 2 for list from 06/07 paper) and the Service Level Agreement put in place by two of the three main funders (see appendix 3).

### 3. Proposed Aims for 2007/8

It is the proposal of this report that the aims of the marketing plan for 2007/8 should encompass both marketing efforts through print, web-based activities and PR, but should expand its remit to include:

- The performance of tourism businesses
- Development of people who work within this sector
- Work more closely with local authorities and regeneration groups to ensure synergy with all areas of infrastructure and sustainable transport links which may impact on the visitor experience as a whole.

There is great synergy for all of the above proposals with the Partnership constitution, Service Level Agreement and Destination Management plan for Cumbria – The Lake District. The targets for the Partnership are set for the next three years within the Service Level Agreement (ref. Appendix 3 – 6.0 Measures), and these proposals aim to deliver on all six measures.

### 4. Implementation plan

The proposed 2007 implementation plan has been segmented into three categories:

- i) Marketing, Promotion and Information
- ii) Product Development

iii) Additional projects

There are two proposals within this report which encompasses activities from all three categories.

a) **Proposal 1**

The Partnership to continue with core marketing activity for the 2007/8 period, as per the 2006/7 year. This proposal and budget has been set out in Appendix 4a.

b) **Proposal 2**

The Partnership continue to carry out the majority of marketing activity from the previous year, but in addition expand the remit of the work that the Partnership carry out, but incorporating product and business development, and an element of research. This proposal and budget has been set out in Appendix 4b.

N.B. A glossary of proposed activity is listed in Appendix 6.

**Proposed Categories**

i) **Marketing, Promotion and Information**

Objective: *To communicate through an effective medium to potential visitors, the range of quality accommodation, attractions and businesses the Western Lake District has to offer.*

Outputs: Publication production and promotion through PR, media campaign and partner projects such as Hidden Treasures. Cycle development is represented as part of information, although is also a key product development. Proposal 2 would see the role of the Marketing Specialist carrying out part duties of PR.

Activity	Measure	SLA	DMP	Proposal no.
Guide	Steam/Conversion/DMS (room occupancy)	4.1/3	1/2	1/2
TVA	Steam	4.3	1/2	1/2
Website	Steam/Stats/Feedback/DMS		1/2	1/2
Media campaign	Conversion/Benchmark	4.6.1	1	1/2
Newsletter – Consumer and Trade	Response/Conversion/Guide		2	1/2
PR	Steam/DMS – all indirect	6.5	2	1/2– diff degrees
Group Travel Guide	Bookings			2006-8
Hidden Treasures	CT	4.6.3		All
Cycle Maps	Feedback/Steam (indirect)	4.6.6		All

ii) **Product Development**

Objective: *To develop synergy and umbrella approach with all tourism partners aiming at developing activities and quality in business in Western Lake District. All of the below proposals would invest a percentage of marketing budget and seek to match fund from Cumbria Tourism. Additional sources of funding would come from existing budget proposals being re-cut to include these activities.*

Outputs: Development of tourism businesses and staff through accreditation and training schemes; Work with existing clusters and development of new clusters; Market Town Initiatives (MTI) and Regeneration group support through tactical marketing.

Activity	Measure	SLA	DMP	Proposal
Cluster Development	No and type developed/Project implementation/Steam	6.6		2
MTI/Regeneration support/Event support	Project implementation/Steam	4.6.3/ 4.3.6/6.6	3	2
Product development	No of businesses and staff to train/Steam/Business accreditation schemes		3/6	2
Training Roadshows	Attendance/Job creation/Conversion		6	2
Tourism Business Development	No of businesses and staff to train/DMS (room occupancy)/Steam (job creation)/Conversion (quality survey)		4/5/6	2

iii) Additional Projects

Objective: *Engagement with members of Partnership, local visitors and group travel organisers.*

Outputs: Exhibitions and Events; Residents week; Extravaganza; FAM Trips (non PR related).

Activity	Measure	SLA	DMP	Proposal
Exhibitions	Bookings taken at attractions			1/2 – to be further reviewed.
Residents week	Attraction visit numbers off-peak			Based on feedback and cost for advertising with CN Newspapers, it is proposed that an increase in local attraction PR, through WLDTP during shoulder months. Proposal to investigate media group proposals for NEW type of residents week, in line with budget.
Extravaganza	Number of members who attend	6.6		All – not a previous AGM, but NEW format as workshop and AGM.
FAM trips				Based on 2005/6 attendance and feedback, current format for FAM trips does not appear to justify spend. Potential for new format or replace activity with a more cost effective way of familiarising staff.

5. Measures

In order to measure the activities of the Partnership, it is proposed that a certain amount of consumer and business research be carried out as part of the 2007/8 plan. Research can be carried out as part of partner programmes or by the Partnership as a stand-alone project to measure for example: the effectiveness of the Guide and media campaign. This element has been factored into both proposals.

6. Budget

Full budget plan for both proposals are detailed in Appendix 4 a & b.

7. Timing

A full implementation timing plan is detailed in Appendix 5.

8. Recommendations

It is the recommendation of this report to carry out the plan laid out in Proposal 2 for 2007/8. As this plan expands the current remit of the Partnership and its employees, it is proposed that the Marketing Specialist role be increased by an additional half day in the first instance, with a review after a 6 month period to assess the workload and roles.

## Appendices Index

Appendix 1 – Background to Western Lake District Tourism Partnership

Appendix 2 – Destination Management Plan Objectives

Appendix 3 – Service Level Agreement

Appendix 4 – Budget Proposals 1 & 2 – Excel document attachment

Appendix 5 – Year Plan – Excel document attachment

Appendix 6 – Glossary of activities

### Appendix 1

#### **Western Lake District Tourism Partnership**

The Western Lake District Tourism Partnership (WLDTP) is a public and private sector funded organisation. Its main funders are Allerdale and Copeland Borough Councils and West Cumbria Development fund, and through private sector support in the form of advertising revenue.

WLDTP is supported by Cumbria Tourism, who are currently accountable body to the Partnership and take line management responsibility, and private sector initiatives that sit on the Steering Group, these range from accommodation providers to attractions to tourism groups. There is a constitution in place which gives full details of all working matters of the Partnership, for further details please contact Denise Smalley on: 01900 818447.

Over the past year the Partnership have carried out various marketing activities within the budget previously set, although it can be seen that based on the parameters set for development of destination management within the county and also the service level agreements set, there are some areas for further development, which could be encompassed in the 2007 Strategic Plan. These will further enhance the visitor experience and are areas which the Partnership should be looking to be involved and potentially invest a proportion of its budget in.

### Appendix 2

#### **Destination Management Plan - Objectives**

Objective 1: Marketing and Promotion

Objective 2: Information

Objective 3: World-Class Product Development and Investment

Objective 4: Infrastructure

Objective 5: Performance of Tourism Businesses

Objective 6: Potential of People who work in Tourism

Objective 7: Representation of Visitors and the Industry

Objective 8: Measurement and Research





### Appendix 3

#### Service Level Agreement

#### Abbreviations:

ABC = Allerdale Borough Council  
WLDTP = Western Lake District Tourism Partnership  
CBC = Copeland Borough Council  
CTB = Cumbria Tourist Board  
WCDF = West Cumbria Development Fund  
KTA = Keswick Tourism Association  
STAG = Silloth Tourism Action Group  
HWP = Hadrian's Wall Partnership  
MT&MP = Maryport Tourism and Marketing Partnership  
AONB = Area of Outstanding Natural Beauty  
MTI = Market Towns Initiative

#### 1. INTRODUCTION

- 1.1 This is an Agreement between Copeland Borough Council/Allerdale Borough Council (hereinafter called the Councils) and Western Lake District Tourism Partnership (hereinafter called WLDTP)
- 1.2 The Councils wish to use the services of the WLDTP for the purpose of marketing and developing tourism in the local government boundary areas of Allerdale and Copeland.

#### 2.0 LENGTH OF AGREEMENT

- 2.1 This Agreement sets out the broad terms of the relationship between the Councils and the WLDTP for a three year period commencing April 1, 2006. It will be reviewed annually and amended as necessary to reflect any significant changes that either party may wish to incorporate.
- 2.2 The terms of the agreement and the funding arrangements as they apply to the Councils will need to be ratified on an annual basis, three months prior to the start of the next financial year. Failure to ratify those terms means that the overall agreement is invalid and that there is no obligation on the part of the Councils to make grant payments for the following years and no obligation on WLDTP to carry out any services.
- 2.3 This agreement will terminate on March 31<sup>st</sup>, 2009, unless the parties shall have agreed new terms by no later than December 31<sup>st</sup>, 2008.
- 2.4 The terms of this agreement may only be altered with the consent of both the Councils and WLDTP.

#### 3.0 GRANT FROM ALLERDALE & COPELAND BOROUGH COUNCILS

- 3.1 The Councils will provide funding to WLDTP of £25,000 each for the financial year 2006-2007.
- 3.2 The Councils agree in principle to provide further funding of £25,000 each per year to WLDTP for the financial years 2007-2008 and 2008-2009 on annual ratification of the terms of this agreement by 1<sup>st</sup> April in each year subject to approval of budget bids.

#### 4.0 SERVICES PROVIDED BY WESTERN LAKE DISTRICT TOURISM PARTNERSHIP

- 4.1 The Councils will each continue to contribute up to half the cost of the fulfilment of the Western Lake District Visitor Guide, up to a maximum of £4,500 per council (from existing postage budgets) per financial year, subject to regular reviews, utilising conversion research commissioned by the WLDTP, to ensure effectiveness of resources.
- 4.2 WLDTP staff will continue to deliver the range of activities formerly carried out by their previous Marketing Manager and outlined in the WLDTP's Marketing Strategy and Funding Requirements 2005 document. Attached as appendix 1.
- 4.3 Production of the Western Lake District Visitor Guide and Top Attractions leaflet will be handled by WLDTP staff and will require no extra resource from the Councils. The guides and leaflet will be produced by November of each year and distribution managed by WLDTP.
- 4.4 WLDTP will annually update in November accommodation and attractions providers on DMS for use on WLDTP and the Councils websites.
- 4.5 WLDTP will ensure equal representation of both Allerdale and Copeland editorial material within the Western Lake District Visitor Guide and other published material that serves to market the Western Lake District.
- 4.6 Working with the Councils, WLDTP will:
  - 4.6.1 Undertake a marketing campaign to encourage greater private sector engagement from Allerdale/Copeland-based businesses.
  - 4.6.2 Investigate new 'gateway' facilities for the Western Lake District following the expiration of the arrangement with the Lakeland Sheep & Wool Centre in Cockermouth.
  - 4.6.3 Ensure greater alignment between marketing activities carried out in Allerdale/Copeland by a wide range of organisations, including CTB, KTA, STAG, Solway Coast AONB, HWP, Re-discover Whitehaven and MTI programmes in Millom, Egremont, Keswick, Cockermouth and North Allerdale.
  - 4.6.4 Develop a comprehensive photographic library of images of the Western Lake District area, comprising equal representation of both Allerdale and Copeland material, available for use by both organisations
  - 4.6.5 Actively lobby for and promote the borough-based tourism initiatives, such as Derwent Forest, Derwent Valley, Workington Town Centre, Port of Workington, Maryport heritage plans, Solway Coast AONB, Regeneration Whitehaven, Egremont Tourism Study & Implementation and Millom Tourism Development.
  - 4.6.6 Investigate and implement where appropriate a range of new initiatives aimed at improving the tourism offer within Allerdale/Copeland, such as a 'brown signs' strategy, quality accommodation promotions, familiarity visits, reduced entry offers, etc.
  - 4.6.7 Actively promote tourism-related events and festivals within the boroughs, such as Jennings Bitter & Blues Festival, Solfest, Ulreby Carnival, Curwen Fair, Whitehaven Maritime Festival, Egremont Crab Fair, Millom Heritage Open Days and others.

## 5.0 CONDITIONS OF GRANT

- 5.1 Accountable body status for the WLDTP and attendant employment responsibilities will transfer from CBC to CTB. The CTB's Brand Manager for Keswick and the Western Lakes will assume line management responsibility for WLDTP employees but the WLDTP's Delivery Group will retain responsibility for determining WLDTP employees' work programme and priorities. This new regime will come into effect following the conclusion of the previous funding arrangement and prior to the start of a new regime in April 2006. The staff will be based in the same offices as the local Brand Manager of CTB.
- 5.2 WLDTP will ensure that standards of financial regulation acceptable to the Councils are put in place and will make available to the Councils on a quarterly basis an analysis of income and expenditure within 10 working days of quarter end.
- 5.3 WLDTP staff will meet monthly with the Councils' staff and CTB Brand Manager to monitor progress.
- 5.4 The WLDTP will provide an annual audit of the Partnership's activities and performance within Allerdale & Copeland.
- 5.5 The Councils' logos will be on all published material from WLDTP and on press releases where possible.
- 6.0 Measures
- 6.1 Increase tourist numbers by 5% per borough (Calculation based on past performance - Measured by STEAM)
- 6.2 Increase tourist spend by 5% per borough (Calculation based on past performance - Measured by STEAM)
- 6.3 Increase jobs supported by 5% per borough (Calculation based on past performance - Measured by STEAM)
- 6.4 Increase room occupancy by 5% per borough (Calculation from DMS)
- 6.5 Increase profile in local and national press (measured by press cutting service)
- 6.6 Develop 2 accommodation clusters, (1 Millom, 1 North Allerdale networking accommodation providers to work in partnership)
- 6.7 Measures are based on a normal trading season, without major local or national events or occurrences that affect tourism performance overall.

### Appendix 4

Budget proposal attached as excel document.

### Appendix 5

Year plan attached as excel document.



Appendix 4a - Proposal 1 - 2007

Activity	Estimated spend	Income	Responsibility	Change?	SLA/DMP ref	Topline Costs	% Budget
Operating Charges						Projected	150252.5
Core Projects						Budget	157424.7
Visitor Guide Production	25000	90000	Cypher	NEW - include gloss cover	DMP: Objective 1/2 & SLA: 4.3	Employment	45152.5
Guide Distribution - public	9000	9000	Carrier	Natural increase and email data capture	SLA: 4.1	Admin	7900
Guide Distribution - WLDTP	6000	6000	Carrier	Additional direct mail	SLA: 4.3	Marketing (operating)	93500
Guide Media Campaign	6500	6500	Various	RSVP	DMP: Objective 1 & SLA: 4.6.1	Research	1000
Conversion research	1000	1000	CN Research/Other	Assuming no change in income	DMP: Objective 8	Training	2500
TVA Production	14000	14000	Cypher	Assuming same qty layout	DMP: Objective 1/2 & SLA: 4.3	Contingency	200
TVA Distribution 1	5250	5250	AHA	Agreed increase		Computer	200
Ongoing artwork costs	300	300	Cypher			TOTAL	150252.5
Website Development	1000	1000	Cypher		DMP: Objective 1/2		
Website Hosting	100	100	Cypher				
DMS (stitch+set-up)	550	550	New Vision				
PR	12000	12000	Osprey		DMP: Objective 2 & SLA: 6.5		
Press trips (FAM)	1000	1000	Osprey				
Photography	2500	2500	BS	Agreed increase	SLA: 4.6.4		
Newsletter - Industry	500	500	Cypher	Quarterly	DMP: Objective 2		
Advertising and PR	500	500	Various	all advertising to be part of annual media			
Ad Hoc Projects							
Residents Week	1000	1000	Various	In different format			
Exhibitions (WTM+BTF)	1000	1000	Various	Assuming attendance at each			
Extravaganza	300	300	Catering co.	As AGM with workshops			
Hidden Treasures	1500	1500	CT	Assuming same project			
Cycle Network	5500	7500	Underpend at 7.500				
Employment Costs							
Staff costs	45152.5						
Training							
Computer Costs							
	200						
Admin Costs:							
CT Management fee	2500						
meals	2400						
Office rental/sundries	3000						
Contingency	2500						
2006 Underpend		5424.67					
TOTAL	150252.5	157424.67					100%
Funding 1	157424.67			Assuming no increase			
Funding 2	162024.67			11722.17			
Income increase - Guide/TVA	50050	4550		Assuming 10%			

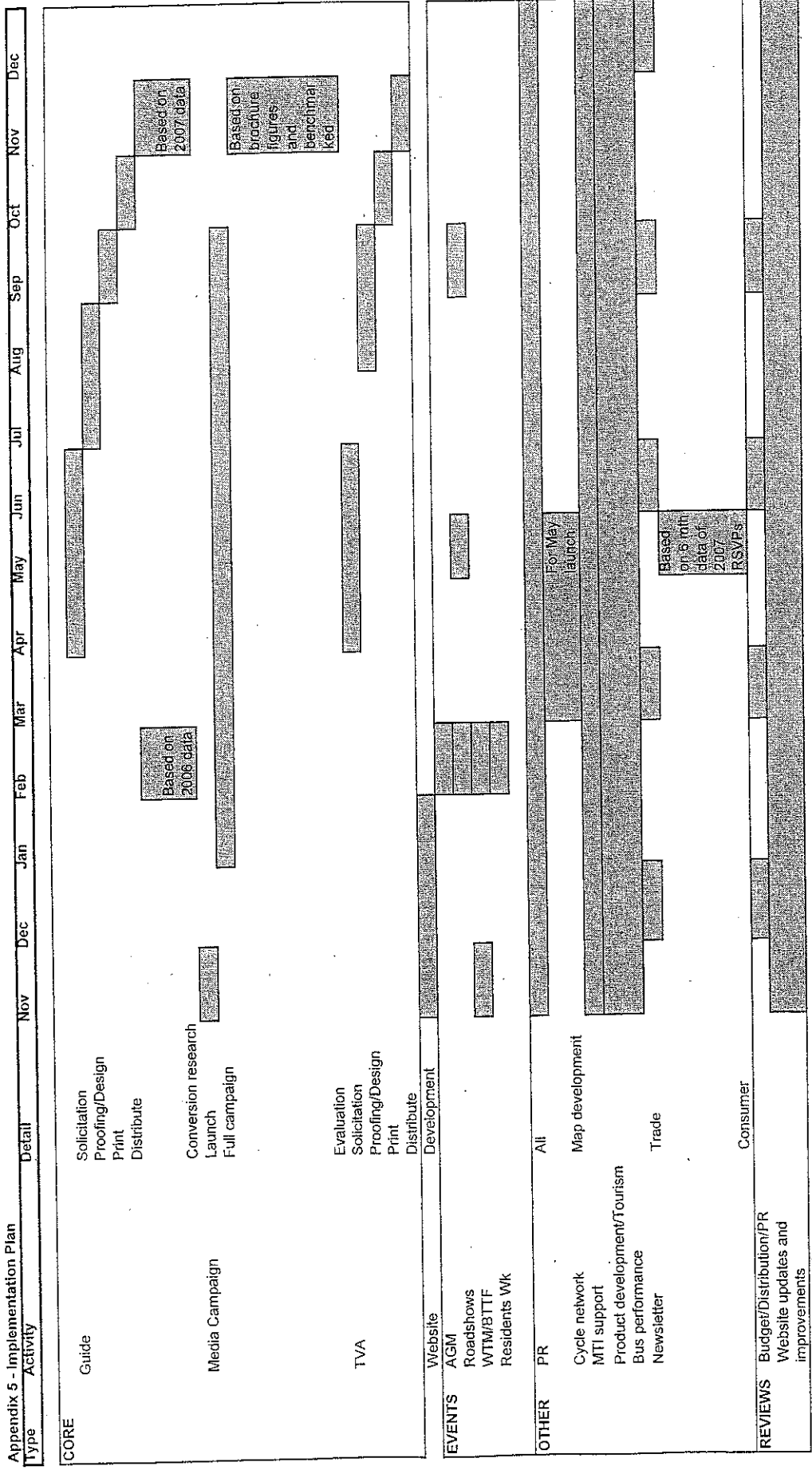


Appendix 4b-Proposal 2 - 2002

Activity	Estimated spend	Income	Responsibility	Change 2	SLA/DMP ref	Topline Costs Projected Budget	% of Budget
Operating Charges						161102.5	
Core Projects						165694	
Visitor Guide Production	25000		90000 Cypher	NEW - Gloss cover or questionnaire/competition form insert	DMP: Objective 1/2 & SLA: 4.3	50202.5	31
Guide Distribution - public	9000		9000 Carrier	Additional increase and email data capture	SLA: 4.1	8400	5
Guide Distribution - WLDTP	6000		Various	Additional direct mail	SLA: 4.3	95500	59
Guide Media Campaign	5000		Research/Other	Based on 4,000 from 2005 database RSVP	DMP: Objective 1 & SLA: 4.6.1	1500	1
Conveyance Research	1000		TBC	NEW - Postal add rate CT research	DMP: Objective 8	2000	1
Additional research	500		65000 Cypher		DMP: Objective 8	3500	2
TVA Production	14500		5250 AHA		DMP: Objective 1/2 & SLA: 4.3	161102.5	100
TVA Distribution 1	5250		300 Cypher			5684 Not included	
On-going artwork costs	300						
Website Development	1000		Cypher		DMP: Objective 1/2		
Website Hosting	100		Cypher				
DMS (eitch+set-up)	550		New Vision				
PR - National	8000		Csprey	£4,000 is an estimate for the national/some regional contact. Assumes MS take more responsibility for local/some regional PR	DMP: Objective 2 & SLA: 6.5		
Press trips (FAM)	1000		Csprey				
Photography	2500		BS		SLA: 4.6.4		
Newsletters - industry	500		Cypher	Trial sample as proposal 1	DMP: Objective 2		
Newsletters - consumer	500		Carrier				
Ad hoc Projects							
Exhibitions - BTTF/WTM	1000		Various	Attendance at both	SLA: 4.6.3		
Extravaganza	300		Catering co.	As previous year			
Hidden Treasures	1500		CT	Assuming same project	SLA: 4.6.6		
Cycle Training	5000		carried over at 5000 ESK	Additional funding for contribution towards MTI and gap development - to be matched in tourism and conservation partnership - membership and small funding towards member projects - to be explored further.			
Product development for tourism business performance	7000		10000 T&CP/CT/Various	Welcome Host/Cyclist & Walker accreditation - WLD business members scheme - eligible for grant, e.g. Advertiser discount	DMP: Objective 3/4/5/6		
MTI/Qualium Initiative project support	2000		MTIs	Small funding towards ad hoc MTI marketing support and cluster development - potential match funding?	SLA: 4.6.3/4.6.6/5.6		
Employment Costs							
Staff costs	50202.5		CIM	Additional half day for specialist	DMP: Objective 6		
Training	2000			Child training			
Computer Costs	500			Rental and electrical items			
Admin Costs	2500						
CT Management fee	2400						
Phone/Staff/Steering Gp meals	3000						
Office rental-set-up	3500						
Contingency	5684						
2006 underspend	161102.5		165694				
TOTAL	161102.5		165694				
Funding	10000						
Additional Income	5000			Assuming 10%			
Income Increase - Guide/TVA	5000						
Underspend - Cycle	165694						
Joint funding							









## Appendix 6

### **Glossary of Activities**

#### **Marketing, Promotion and Information**

##### **Holiday Guide:**

An annual, A4 colour brochure detailing all types of accommodation, attractions, eateries and general information on WLD. Businesses pay to advertise within the Guide, and in return the Partnership promote through a full media campaign, website and PR. The print run for this is 60,000 copies, printed in October each year for November distribution.

##### **Top Visitor Attraction leaflet (TVA):**

An annual 1/3 A4 colour leaflet, detailing all attractions and general information in the WLD. 2007 TVA introduced eateries into the publication. Businesses pay to advertise within the TVA. The print run for this publication is 250,000, printed in November, and distributed December for the New Year. Distribution to all TICs in Cumbria, WLD accommodation and attractions that subscribe to our current distributor AHA marketing, North of England and South Scotland. TVA is also distributed at Tebay services, along Hadrian's Wall road route, and the Blackpool area.

##### **Website:**

Newly developed site to house the Destination Management system, an online booking system which enables customers to book directly on-line with accommodations. Accommodations are able to update their availability on-line to aid this process. Advertisers into the Guide and TVA receive free entry onto the website.

##### **Media Campaign:**

Yearly campaign designed to promote the WLD and its publications. The media campaign covers sales promotion, direct mail, guide finder services, national advert placement, lifestyle magazines, and on-line search engine placement.

##### **E-Newsletter:**

Quarterly newsletter sent out to all members of the Partnership and additional tourism businesses in the WLD. Sent out by email. Contents range from what's new in the area, to a profile of a local business each quarter.

NEW – Consumer newsletter planned for summer, using email addresses collected from first 6 months of 2007. Communication to include introduction to the area, what's new and competitions to initiate consumer responses.

##### **PR:**

Local, regional and national press releases produced by both WLDTP team and Osprey Communications. Regional and national press trips run throughout the year to promote the area, all run currently by Osprey Communications. Proposal 2 sees the Marketing Specialist take on some regional and all local PR.

##### **Hidden Treasures:**

National marketing campaign run by Cumbria Tourism to help promote the 'Hidden Treasures' of Cumbria, of which WLD has many.

##### **Cycle Maps:**

NEW – Development of cycle maps for the WLD over 3-5 year period. The aim being to develop collection of maps alongside Regeneration groups and Market Towns initiatives which will be sustainable, consumer friendly, and aligned to other areas in Cumbria.

#### **Product Development**

##### **Cluster Development:**

Tourism business or activity cluster development, e.g. Cycle Cluster.

MTI/Regeneration Group support/Event support:  
Working more closely with groups to ensure alignment of tourism based activities and events.  
Potential investment where possible in MTI/Regeneration group initiatives.

Product Development:  
Invest in conservation projects where possible through Tourism and Conservation partnership. Invest in other projects which support the development of high quality products for the area ,e.g. Cycle map development.

Tourism Business Development/Roadshows:  
Support of skills development and accreditation schemes for tourism businesses to further enhance the quality offering for visitors coming into the area. These types of schemes also add to job creation and have a knock-on effect of visitor numbers, spend and room occupancy through the development of higher quality services, staff and accreditation inclusion (e.g. Cyclist and Walker Welcome).

Exhibitions:  
Attendance at Group Travel exhibitions as WLD but on behalf of attractions. Current attendance at World Travel Market and British Trade and Travel Festival. Contacts collected at each show and passed onto relevant attractions.

Residents Week:  
Advert taken in Cumbrian Newspaper publications on behalf of attractions to offer residents discounted entry over February half-term.

Extravaganza:  
AGM, leaflet swap and networking opportunity arranged by WLDTP on behalf of all tourism businesses in WLD. Historically held at Sellafield Visitors Centre.

FAM Trips:  
Familiarisation trips run by WLD to familiarise staff from TICs and local tourism businesses.