Bradford District
Destination Management Plan

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Introduction

The total **value** of the visitor economy was estimated to be worth £612m to Bradford District in 2015. This supported approximately 9,600 FTE jobs across the district. While a key economic sector, the visitor economy is not fulfilling its enormous potential – it could be delivering more spend and jobs.

This Destination Management Plan (DMP) aims to identify an **ambitious shared vision** and common goals for the future growth of the visitor economy of Bradford District. It identifies the priorities, and the interventions that will add real value to the visitor economy across the whole area and in individual destinations within it.

Tourism in Bradford District

Bradford District has some **exceptional product** in places. Haworth, and Saltaire are Unique Selling Points (USPs) for the district with a strong sense of place and visitor experience. They have national and international appeal. The National Media Museum is one the north's most visited museums and a key attractor. The district has a developing range of exciting events. There are also a number of key attractions and particular **themes** which either generate visits and / or have strong development potential – Ilkley Moor and the outdoors, literature, curry, Hockney etc.

The **bulk of accommodation** is in Bradford city. Occupancies in Bradford, while improving, are relatively low for a major city and rates are low. Overnight stays in Bradford are typically **non-discretionary.** They are driven by corporate/business travel, low budget travel trade groups, visiting friends and relatives and family events (such as weddings). Events and festivals and the Alhambra also generate overnight stays.

Within the **Haworth area** there are some short stay / additional holidays – probably driven by the wider South Pennines / West Yorkshire offer, and a combination of activities (sightseeing, walking etc.). **Day visitors** are an important market – key groups include attraction visitors, sightseers, special interest/activity visitors for walking and events etc.

In visitor economy terms, Bradford District is a **diverse** area. Perceptions of, and associations with different parts of the district vary. As such, a 'Bradford' brand is not necessarily appropriate for Ilkley/Wharfdale, and Haworth and upper Airedale. While there is some stand out product in the district, there is a lack of **critical mass and connectivity** (both in physical and thematic/offer terms) between areas. This means that the district functions more as a series of separate experiences but not a compelling or coherent destination. As a consequence, length of stay is relatively short.

Bradford, as a visitor destination, has challenges. It suffers from issues regarding its perception and does not have a critical mass of product.

However there are **opportunities**. Bradford is benefiting from a significant amount of positive development, the district's **events** programme has significant potential, and there are a number of **themes** that have further development potential and could provide unique experiences for visitors.

Aim and objectives

The primary **aim** for intervention in the visitor economy at a destination level is the generation of spend, profit and jobs. In its simplest terms this aim is achieved by a combination of attracting more visitors, and increasing their length of stay and spend. The aspiration should be to have a visitor economy in the district that generates over £725m.

Across the district, more specific **objectives** differ slightly by area. For Bradford, intervention in the visitor economy, while trying to drive new business to the city centre, should also focus on:

- developing product and providing more compelling reasons to visit;
- helping to raise the profile and build a brand for Bradford as a destination(and as place for investment etc.);
- supporting city centre development and animation.

Within the rest of the district, particularly Haworth and Saltaire but also Ilkley and the rural areas the following are important objectives:

- ensuring good management of the destination;
- increasing length of stay;
- growing business out-of-season.

Strategic Approach

Developing the visitor economy in Bradford District must be predicated on a clear identification of **target audiences**. The DMP outlines a number of markets (e.g. UK coach operators and group organisers, overseas coach tours, families, 'active indulgents', 'young explorers' and event visitors) which have different characteristics and needs. Different approaches will be required to attract them.

Future activity must continue to focus on four places and areas – Bradford, Haworth, Saltaire and Ilkley. These are distinct places, separate from each other with generally different offers and markets.   The DMP identifies the **essence of the offer** of these areas from a visitor perspective and how these areas can be **positioned** in the market place.

While, achieving a unified brand concept for the whole area and developing campaigns for each destination is probably unrealistic, 'Bradford and beyond' provides a potential umbrella for marketing the whole of the area. However, the key to successful communication will be the messaging and activities below this umbrella.

The Destination Management Plan – Product and Place

For the district to truly realise its significant potential there is a **need for further product development.**

This is particularly the case for Bradford itself. A longer term aspiration is for the development of a second major city centre arts or cultural facility to complement the National Media Museum.

Outside of the city centre the product and place priorities are primarily around improving **visitor management** (i.e. toilet provision, car and coach parking, signing and interpretation), and continued development of quality retail, and catering businesses

Across the district there are a number of themes or areas for potential product development. The key one is further development and promotion of an **events and festivals** programme. which strengthens the key themes and offers of the district and its destinations and helps create demand at quieter times. **Curry** is a strong theme for Bradford but not easy to experience as a product -further development of the offer is a priority. **Hockney,** as a theme, has huge potential for Bradford if it can be further developed and would be the ideal theme for a major new arts facility (see above). **Guided tours** and added value activities for coach groups would be desirable, particularly in Bradford itself.

The Destination Management Plan – Promotion and Information

There are a number of crosscutting principles that should underpin destination marketing – these include:

- Building **awareness** of the district and the wealth of its options.
- Focusing on **the market and the experience**. Markets are becoming more focused on experiences and less on places. This is particularly the case for a destination like Bradford district where awareness is not strong and perceptions can be negative, but where appealing experiences can be presented
- **Dynamic** marketing with experiences and itineraries changing through the year – reflecting seasons, what's new and fresh (e.g. events and festivals) etc.
- **Upselling** and **cross selling** the destination with the promotion of specific experiences should focus on upselling something else in the district.
- Keeping it **simple** and making it easy – experiences and itineraries need to be simple (e.g. based around a half day or 24 hour option) with only a limited number of options. Too much information is counter-productive.
- Developing new ways of delivering **in-destination** information.

The Destination Management Plan - Facilitation and Partnership

The visitor economy in the district is not working as a coherent whole – partnerships across the district and within specific areas are quite weakly developed.

Moving forward the visitor economy sector needs **leadership** in terms of an organisation or group that will drive the Destination Management Plan forward. This should be VisitBradford supported by a steering group with significant private sector involvement.

Stronger partnerships and working arrangements are required within BDMC (e.g. across planning, regeneration, place marketing, WHS management, events, culture etc.), with other destinations (Leeds, and West Yorkshire, the Dales and Harrogate), and with Welcome to Yorkshire.

1. Introduction

TEAM Tourism Consulting (TEAM) was appointed by Bradford Metropolitan District Council to prepare a Destination Management Plan for the five-year period 2016-2021.

The total value of the visitor economy was estimated to be worth £612m to Bradford District[1] in 2015. This supported approximately 9600 FTE jobs across the district. While a key economic sector within the district, the visitor economy is not fulfilling its enormous potential – it could be delivering more spend and jobs.

The key aspiration for the wider tourism and visitor economy is to boost these visitor numbers and spend.

However, Bradford is a complex destination with a range of potential attractors that generate visits and a range of different types of visitor with different characteristics, needs, and interests. It also a number of different places with different characteristics and differing appeals to visitors.

The Destination Management Plan (DMP) therefore aims to identify an ambitious shared vision and common goals for the future growth of the visitor economy of Bradford District. It identifies the priorities, and the interventions that will add real value to the visitor economy across the whole area and in individual destinations within it.

It is about collaborative action, and provides a framework for all partners in the area with an interest in the Visitor Economy to work together effectively to improve and develop the destination over the next five years.

This Plan has been developed with ideas and observations from a wide range of businesses, attractions and public, private and volunteer representatives involved in the visitor economy of the area.

[1] The Economic Impact of Tourism on Bradford District 2015. This includes direct day and staying visitor expenditure, spend on second homes and by residents of the area who are hosting friends and relatives. It also includes multiplier effects – i.e. successive rounds of expenditure by tourism related businesses employers.

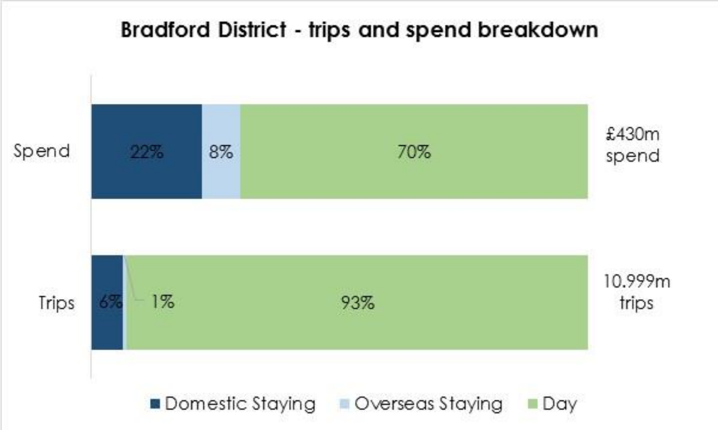
2. Strategic Context

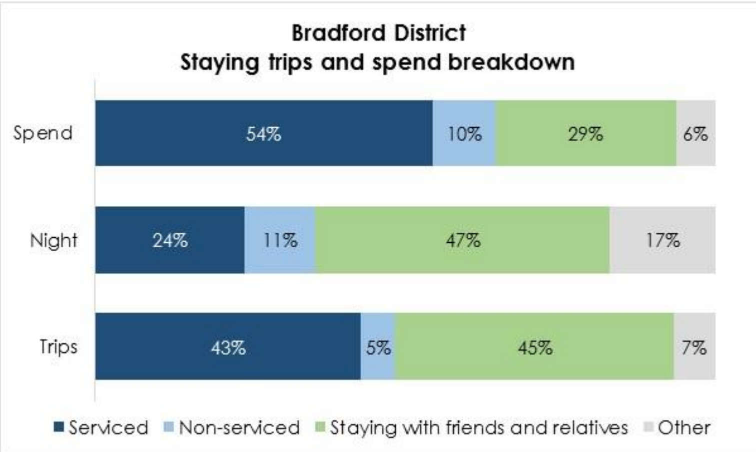
2.1 The Importance of the Visitor Economy

In overall terms, the visitor economy was estimated to be worth £612m to Bradford District[2] in 2015.

There were estimated to be nearly 11m trips to Bradford District in 2015 – these accounted for £430m of direct expenditure.

The majority of this was generated by day visitors who accounted for 93% of trips and 70% of expenditure.





The most common forms of accommodation for staying visitors were serviced (hotels etc. – 43% of trips), and staying with friends and relatives (which accounted for 45% of overnight trips). Visitors staying in serviced accommodation accounted for the majority of spend by staying visitors.

2.2 Market and Consumer Trends

Over the next decade, the visitor market place will be influenced by a range of factors – economic, demographic, social and technological. The key ones are (see appendix 1 for more details):

- **Continued growth in demand** – both domestic tourism and inbound are forecast to grow in the medium term.
- **Domestic visitors are often creatures of habit** – most people booking a UK destination do not consider another destination and the vast majority will have visited that place

[2] The Economic Impact of Tourism on Bradford District 2015. This includes direct day and staying visitor expenditure, spend on second homes and by residents of the area who are hosting friends and relatives. It also includes multiplier effects – i.e. successive rounds of expenditure by tourism related businesses employers.

previously. Visitors will typically be looking at options in their immediate region (up to 2 hours away).

- **Changes in the UK population** with an ageing population, a growth in younger generations, and a smaller time poor middle generation. All have different travel requirements. Family structures are evolving with the rise of the 'Vertical Family'. Bradford District has the fourth largest population for a metropolitan district and is home to half a million people. It is the youngest city in the England with over 124,000 people aged under 16.
- **Online booking and marketing -** the internet is the primary source of visitor information with a number of well-established travel sites in the market place, Destination sites are only one of these - they tend to be used at the planning stage of the customer journey.-
  - The direction of travel in information provision is '**mobile first'**. Rating experiences, **making information simple, and developing customised unique experiences** are also key trends in customer demands.
  - **Social networking will increase in importance** - online networks will be a vital channel for businesses for distribution, awareness creation and recommendations.
- **Tourism is becoming increasingly experiential** - the 'what' is more important than the 'where'. We are also **more 'active'** (i.e. doing many things) creating time pressures and a subsequent desire for control in our lives. This means a desire for greater **simplicity** in some of our choices and, linked to the technology trend, is the move to 'Individualocracy' and the desire for personalised products.

2.3 The Policy Context

Tourism and the visitor economy, within Bradford District, is seen as an important element in a number of policy related documents (see appendix 2). Key points include the need:

- To develop a unique and attractive offer in Bradford city but which is complimentary to neighbouring towns and cities.
- To develop the evening economy, a rich programme of events and leisure opportunities; and new cultural and visitor attractions.
- For the development of a Festival City
- To address the 'whole' experience – for example, investing in parking and transport; bars and restaurants and shopping will create a better holistic experience
- To re-position Bradford (using culture) as an appealing City in the minds of residents and visitors
- For development of the visitor product in Airedale to be concentrated at the three key destinations of Saltaire World Heritage Site, Keighley and Worth Valley Railway and Haworth.

3. Tourism in Bradford District

3.1 The offer

Bradford District has some **exceptional product** in places. **Haworth**, and **Saltaire** are Unique Selling Points (USPs) for the district with a strong sense of place and visitor experience. They have national and international appeal. The **National Media Museum** is one the north's most visited museums and a key attractor. These are all identified in mainstream guides (like the Rough Guide and Lonely Planet) (see appendix 4).

Keighley and Worth Valley Railway is an important regional attraction.

There are a number of other key 'attractors' that generate visits (both day and overnight) that include:

- **Events and festivals**; – the district has a range of quality events. Some will have relatively local (and possibly regional) appeal while others will have national (but niche) appeal. Examples include Bingley Live, Saltaire Festival, Ilkley Literature Festival, Bradford Literature Festival, Curry Festival, the Mela;
- The **Alhambra** – strong regional theatre with West End and other productions;
- The **walking and cycling** product – this is good but, compared to potential competitor destinations is not necessarily unique except where it ties into 'sense of place' – for example Haworth and Penistone Hill, and, of course, Ilkley Moor.
- **Bradford's museums** (especially Bradford Industrial Museum), and
- **Ilkley** and the Wharfe Valley, which offer a pleasant destination of walking, shopping and dining (particularly in a regional context).
- **Family attractions –** like the National Media Museum, other Bradford Museums, Shipley Glen Tramway, Ilkley Lido etc.

There are also a number of particular **themes** which have strong potential and give the area some unique stories and experiences. These include architecture (particularly Bradford city centre – e.g. Little Germany), curry (Bradford, Keighley and events), literature and literary heritage (Bronte Parsonage Museum, Literature festivals), film and film locations (National Media Museum, locations like Esholt (Emmerdale) and the Keighley Worth Valley Railway (Railway Children)), Hockney (Salts Mill, Cartwright Hall), industrial heritage (Bradford Industrial Museum), and religious tolerance and peace (Peace Museum, mosque and temple visits).

From a visitor perspective these can be experienced to differing degrees and with different levels of ease or difficulty. Generally, these themes need further development before being taken to market as potential visitor experiences.

A more detailed overview of the product offer is provided in appendix 3.

In terms of **accommodation**, there are over 2000 serviced rooms in Bradford District. About two thirds of these are in the Bradford city centre, with a secondary concentration in the Aire Valley. There are less than 200 rooms respectively in the Haworth and Ilkley areas. About two-thirds of serviced rooms are budget / 2*, and about a third are 3 /4 * quality.

There is also a concentration of self-catering accommodation in the Haworth area (reflecting a leisure / holiday demand) and the University of Bradford can provide bedspaces at certain times and online sites such as Airbnb provide accommodation in private homes in various parts of the district.

Serviced accommodation and staying with friends and relatives account for the majority of overnight stays (see section 2.1).

3.2 Recent and potential developments

Bradford district has seen a number of developments in recent years and has a number of potential developments in the pipeline:

- Hotels – Jurys Inn (2010), Premier Inn (2011) and Travelodge (2012)
- City Park (2012)
- Broadway Shopping Centre (2015)
- Bradford's 'Renaissance' – the Independent Quarter and North Parade, West End, Sunbridge Wells and Ivegate.
- Bradford Odeon – plans to develop the Odeon into a music venue, with 3500 seating and 4000 standing in stalls (making it the third largest in Yorkshire)
- St Georges Hall currently undergoing a £4m refurbishment
- City Centre Growth Zone - a £35 million initiative set-up to support new businesses and existing business growth
- Cinema and restaurant developments near the Broadway centre.

3.3 Markets and performance

In terms of **overnight** markets, occupancies in Bradford, while improving, are relatively low for a major city (approximately 70%). Rates are low (an average of £38.71 in 2014) and room yield was also low (£27.13 in 2014) – as a comparison this was approximately half the yield of York and Leeds.

Overnight stays are typically **non-discretionary** and are driven by:

- **Business** – mainly corporate travellers. Conferences are not a significant component of the business mix and tend to be day events (not overnight)
- **Travel trade** – hotels in Bradford are attracting coach business. This is mainly using Bradford as a base for touring the north (e.g. going to York, Haworth etc.) or as stopover for going to Scotland. Price rather than the destination is the appeal.
- **VFR / social events** – including weddings, graduation, student VFR, the local community
- **Events and Festivals**
- **'City' breaks** – driven by a number of elements – e.g. Alhambra productions, price (and using Bradford as a base for the surrounding area).

Within the Haworth area there are some short stay / additional holidays – probably driven by the wider South Pennines / West Yorkshire offer, and a combination of activities (sightseeing, cities, walking etc.).

In terms of **day visitors** the larger market groups are:

- **Attractions visitors** – typically visiting for one attraction (but not much more). A high proportion of these are local (primarily from Bradford itself) and families, but not all.
- **Sightseers** – these are similarly linked to attraction visitors. They may be visiting an attraction but will also be undertaking a wide range of activities in the destination, typically with a longer dwell time. These are likely to be in Saltaire and Haworth (and Ilkley to a lesser extent). These markets are more likely to be couples / groups of friends, and travelling from further afield.

- **Groups** – these will undertake similar activities to the previous two groups but will be travelling as organised groups – either through the travel trade, clubs and societies or special interest groups
- **Walkers and other outdoor activities**
- **Events visitors**

In addition, there are a number of other smaller day visitor markets – drivers for these will include educational visits, theatre, and special interests (e.g. railways, literature, film etc.).

4. Strengths, Challenges and Opportunities

4.1 Strengths

In terms of its visitor economy, Bradford District has a number of strengths:

- A number of strong USPs, and product with international and national appeal (see section 3.1 above)
- The diversity of the offer – capable of attracting a number of different markets
- A large catchment population in close proximity - particularly the West Yorkshire conurbation and, to a lesser extent, Greater Manchester and Lancashire.
- A central location in UK (which is particularly appealing to the travel trade), and good accessibility (by road, rail and air)
- A number of free attractions (particularly in Bradford)
- Some strong events and festivals with broad appeal
- Attractive hotel rates, particularly in Bradford city centre (and especially at weekends).

4.2 Issues and challenges

In visitor economy terms, Bradford District is a diverse area. This is recognised by its subdivision into four discrete marketing areas. There are some common crosscutting offers and themes that cover parts of the district but not necessarily all of it. This diversity is both a strength and a challenge.

Challenges for the district include:

- There is not a unifying brand (or brand concept) for the district. Perceptions of, and associations with different parts of the district vary. As such a 'Bradford' brand is not necessarily appropriate for Ilkley/Wharfdale, and Haworth and upper Airedale (although there is potentially more relevance for Saltaire / Shipley).
    - Perceptions of Bradford are generally negative
    - Perceptually (and thematically) Haworth has more in common with the South Pennines
    - Ilkley sits more closely with Skipton and south Dales, or with Otley and Harrogate.

  This is reflected in some of the Guide Books (see appendix 4).
- While there is some stand out product in the district, there is a lack of critical mass and connectivity (both in physical and thematic/offer terms) between areas. This means that the district functions more as a series of separate experiences but not a compelling or coherent destination.

- As a consequence, length of stay is relatively short across most of the district's 'destinations' – 2 hours to a half a day would be typical in Saltaire, Haworth, Ilkley and Bradford.
- Bradford, as a visitor destination, has challenges. It suffers from issues regarding its perception (see above) but these are founded on a reality.
    - There is a lack of critical mass of product (e.g. visitors to National Media Museum will come to the city centre but then leave without doing too much more) or a concentration of product in any one area (e.g. museums are outside the city centre and dispersed).
    - Things are improving dramatically (see below) but the city centre is still 'down at heel' in many places. In addition, compared to other city destinations (e.g. Leeds), it does not have a strong or distinctive retail offer, and has a relatively weak evening economy. This has drawn residents of the suburbs away from Bradford City Centre.
    - As a consequence, the centre often lacks animation or a buzz of activity and the 'comfort zone' for visitors is narrow - both in physical terms and also by times of day (particularly in the evening and night time).
    - The 'Bradford story' is not well told or interpreted. This, allied to points above, impacts on its sense of place (compared with Haworth and Saltaire).
    - Public transport links to Bradford city from Leeds, Manchester and London are weak, with old rolling stock and slow services (in contrast to the Aire and Wharfe Valley lines).
- The National Media Museum's positioning is ambiguous – is it a Bradford family fun day out or a regional / national cultural attraction?
- Across the district there are some good events but, there is a lack of a clear events strategy particularly in terms of potential impacts on the visitor economy.
- Opportunities for new development or products that will transform or significantly increase the scale of visitor economies in Haworth, Saltaire and Ilkley are limited – incremental growth is more realistic.
- Within Haworth and, to a lesser extent Saltaire, seasonality is an issue. There are also visitor management issues, particularly in terms of car and coach parking.
- Co-ordination and communication within the tourism sector could be better – both between public and private sector, and private-private sector. Previous groups (such as Destination Bradford) have ceased to exist due to a lack of engagement or focus.
- Resources for development and promotion of the destination are limited and unlikely to increase in the near future.

4.3 Opportunities

While there are challenges, Bradford district as a visitor destination has huge potential and there are significant opportunities for the future.

- There are a number of **themes** that have further development potential and could provide unique experiences for visitors (see section 3.1) – to either broaden the appeal (and length of stay, and spend) of existing visitors or attract new markets.
- Linked to this there is the potential for further development of Bradford district's **events** programme – in terms of strengthening existing or developing new events.
- **Bradford's renaissance** - while there is currently no one major proposed strategic opportunity or 'game changer', there are a number of potential new developments

in Bradford (e.g. the Broadway extension, Odeon, Sunbridge Wells, increasing numbers of overseas students to the University) that will bring about improvements to the offer for residents and visitors and help to further catalyse city centre development.
- Other **potential initiatives** that could impact positively on the visitor economy include the potential establishment of a Business Improvement District (BID) in 2018 (which will have public realm and marketing funds).

5. Aims and objectives

The primary **aim** for intervention in the visitor economy at a destination level is the generation of spend, profit and jobs. In its simplest terms this aim is achieved by a combination of attracting more visitors, and increasing their length of stay and spend.

There is significant potential to grow the visitor economy in Bradford District. Based on the current impact (£612m - see section 2.1), the **aspiration** should be of a visitor economy in the district that generates over £725m. This would help to support an estimated additional 1650 jobs.

Across the district, more specific **objectives** differ slightly by area.

For Bradford, intervention in the visitor economy, while trying to drive new business to the city centre, should also be about the following objectives or outputs:
- Helping to raise the profile and build a brand for Bradford as a destination, and also contribute to a wider place marketing agenda.
- Supporting city centre development and animation.
- Further developing product and providing more compelling reasons to visit.

Within the rest of the district, particularly Haworth and Saltaire but also Ilkley and the rural areas the following are important objectives:
- Ensuring good management of the destination
- Increasing length of stay
- Growing business out-of-season.

6. Strategic Approach

6.1 Markets

Developing the visitor economy in Bradford District must be predicated on a clear identification of target audiences.

The following table summarises potential **markets** to develop and intervene in. These markets will currently already be visiting but to differing degrees.

Market segment	Overview
Coach Operators and Group Organisers (UK)	A UK market comprising retired groups (65+), clubs and societies, from within a 2 hour catchment area. They will be visiting for the day and overnight. They will be attracted by the location and accessibility, the combination of high profile products and attractive countryside, and (potentially) the reasonable rates.
Overseas coach tours	Inbound tour groups looking at UK highlights. Typically first time visits to the UK and likely to be older age groups. Both day and staying visitors. Primary attractions will be Haworth and Saltaire but there would be opportunities to increase spend in Bradford through added value activities.
Families	Younger families (with children aged up to 12-14 years). This will be primarily a day visitor market, typically from Bradford district itself and West Yorkshire but also potentially from further afield. It may be accompanied by a VFR market. The offer will be varied for this market. While there is scope to grow volume, there is also the potential to increase length of stay and spend, create a sense of pride in the local area, and increase awareness.
Active Indulgents	This is a domestic market that will undertake day trips and short breaks. It will predominately be older couples travelling without children and be typically from higher socio-economic groups. They will be interested in heritage, cultural and countryside activities but also in indulging themselves (food, shopping, drink, accommodation).
Young explorers	A domestic market – primarily day tripping from the West Yorkshire area but also from further afield (with some staying visitors). They will be under 35, and either single, couples, or groups of friends. Typically they will be higher socio-economic groups (graduates / young professionals). Primarily a Bradford segment they will be motivated by somewhere different to visit, an authentic and eclectic

	experience, and a combination of cultural activities and nightlife.
Events	Characteristics will vary according to individual events.

More detail is provided on these segments in appendix 4.

6.2 Positioning

This destination plan is not intended to be a branding strategy. However, the positioning of the district and its products is key in developing the visitor economy. Within Bradford District, there are potentially multiple destination brands and products, which will have different levels of resonance depending on the audience. For an international audience, the brand might be as simple as Yorkshire or even just the North – or specifically the Brontes in some markets. For a more local audience, there will be more awareness but perhaps a lack of understanding on how the experiences can fit together.

At present, destination marketing activity focuses on four places and areas – Bradford, Haworth, Saltaire and Ilkley. This makes sense – they are distinct places, separate from each other (although Bradford and Saltaire are more easily connected in terms of transport) with generally different offers and markets.

The following table summarises, for these four areas, the essence of the offer from a visitor perspective and how, in broad terms, these areas can be positioned in the market place.

Bradford City	**South Pennines and Haworth**
Essence of offer: A cultural city – contemporary culture, art and film A festival city A diverse city - multi-cultural, inclusive, colourful Authentic / real Quirky / eclectic / left field Family friendly **Positioning** Day out – Family day out – value, compact, quality - Young explorers – art / culture and nights out Overnight – Bradford Plus break - culture, heritage (inc. Saltaire), Leeds, curry and craft beer - (An added value) base for group excursions	**Essence of offer** Quintessential Yorkshire - rugged / grit / windswept Literary heritage 'Wuthering Heights' Back in time/ a bygone age (KVWR, 1940s weekend etc) Artisan / Fair Trade / Independent Inspirational / active landscape **Positioning** Day out – the Brontes, Haworth and moorland walk - family time together on the KWVR - group excursion Overnight – South Pennines – walking, sightseeing in off-the-beaten-track Yorkshire

Saltaire **Essence of offer** World class heritage Compact beauty Cultured / engaged pottering Arts, crafts and home treat (shopping) Hockney **Positioning** Day out – must see heritage site with art, and luxury shopping - Group excursion	**Ilkley** **Essence of offer** Urbane / chic / smart / trendy Partner time Yorkshire and Victorian hauteur (Harrogate light) Easy outdoors / rugged (but comfortable) Quality restaurants and bars **Positioning** Day out – easy walking, and a spot of indulgence (food, drink, shopping) Overnight – short break base – best of rural and urban.

Achieving a unified brand concept for the whole area is probably unrealistic. Similarly, developing campaigns for each destination (with separate resources and collateral) is probably also unrealistic (even with considerably more resources than are available at present) – although digital marketing techniques allow more differentiation between markets than was previously possible.

'Bradford and beyond' provides a potential umbrella for marketing the whole of the area but key is the messaging and activities below this. Section 8 below outlines the marketing approach in more depth.

Bradford as a city requires a specific focus on its own - it also requires a positioning that differentiates it from competitor cities - Leeds, Sheffield, York, and to a lesser extent Huddersfield and Wakefield. This needs to tie in with wider place marketing activity but from a visitor perspective this could be predicated on three potential pillars:

1. A Cultural City
2. A Festival City
3. A Diverse City.

7. The Destination Management Plan – Product and Place

7.1 Strategic Need

While the district has some excellent product and places, there are challenges to these – and connectivity (both in physical and thematic/offer terms) between areas (see section 4.2). For the district to truly realise its significant potential there is a **need for further product development.**

This is particularly the case for Bradford itself. A longer term aspiration or need would for the development of a second major arts or cultural facility to complement the National Media Museum. Ideally this would be located in the city centre to help to create a greater critical mass of attractions and ideally look to celebrate some of Bradford's themes (see below).

Other priorities in Bradford, from a visitor perspective, include:

- Further development of the **evening economy** - particularly in terms of restaurants and bars. This is gradually happening (see section 3.2) and is being facilitated by city centre development initiatives. The visitor economy can play a role in helping develop this sector – through engagement with it, and targeting markets that will help support these operations (e.g. young explorers – see above).
- Further development and upgrading of the **retail** offer
- **Animation** and management of the city centre particularly in the evening (this links to the previous point about the evening economy).
- In the long term, re-development of the **Bradford Interchange** area which is a poor gateway.
- Achieving the refurbishment of St. George's Hall, and re- development of the Odeon.

Outside of the city centre (primarily within Saltaire, Haworth, and Ilkley) the product and place priorities are primarily around reviewing and improving **visitor management** (i.e. toilet provision, car and coach parking, signing and interpretation), continued development of quality retail, and catering businesses where appropriate, and continued development of **events and festivals,** particularly out-of-season (see below). Saltaire, as a world heritage site, has a comprehensive Management Plan (see appendix 2) which provides an appropriate mechanism for this. This model should be extended to Haworth and Ilkley.

Across the district there are a number of themes or areas for potential product development.

- The key one is further development and promotion of an **events and festivals** programme. As far as possible this should tie in with, and strengthen, the key themes and offers of the district and its destinations (e.g. walking, multiculturalism and diversity (arts, markets, tolerance and peace curry etc.), heritage, photography and film, art literature). Events should be a tool for creating demand at quieter times (the Saltaire Festival and Ilkley Literature Festival are good examples). They should be a key component of the experiences that the destination promotes (see section 8).
- **Curry**. Curry is a strong theme for Bradford – the city is synonymous with it and invests annually in 'Curry Capital'. However, for a visitor it is not necessarily easy to experience this as a product, and the story is not well told. Further development of the offer is a priority.
- **Hockney**. Hockney is one of the UK's most important modern artists (possibly the most important) and a potential theme of huge importance to Bradford if it can be further developed. Hockney would be the ideal theme for a major new arts facility (see above) - which may or may not be feasible. In the interim, the Hockney theme should be further developed as an experience (see section 8) building on Salt's Mill, the Cartwright Gallery and, ideally, temporary exhibitions.
- **Guided tours** that tell the Bradford story and added value activities for coach groups -developing a network or database of guides across the district would be

desirable, particularly in Bradford itself. The city is attracting travel trade business but not maximising spend or word of mouth recommendations from this group. The development of guided packages and other added value activities would increase the spread of visitors within the city centre.

Other strong Bradford district themes, like photography and film, literature, multiculturalism, industrial heritage, and peace and tolerance are best developed through a combination of existing product, guided tours and festivals / events.

While staff training and development is primarily the responsibility of individual businesses, there is a need at destination level to look at improving product knowledge and upselling of the area (on restaurants, places to eat, attractions, transport information etc.) among front of house staff.

7.2 Activities and actions

The following table outlines potential areas of destination intervention for the visitor economy over the next five years.

Activity	Description and action
New cultural facility	Undertake scoping and pre-feasibility study to look at the broad concept, feasibility and siting of a major new cultural facility.
Events Strategy	Development of an events strategy to include an audit of existing activity (particularly identifying primary events with tourist appeal), identify gaps and opportunities, and the types of events to potentially be supported and promoted in the future.
Management Plans	Develop detailed place management plans for Haworth, in the first instance, and Ilkley. These should look at local destination management issues in some depth – e.g. car parking, coach parking and coach facilities, toilets, and information provision (signing, interpretation, information points and potential partnership information outlets) and identify realistic actions for the future.
Curry	Develop the curry product. An initial action will be the development of an appropriate group or partnership of operators that are potentially interested in working on a collaborative basis. Subject to this there should be a programme of 'soft' product development around better information provision on restaurants (how to get to them, opening times and booking requirements, alcohol provision or not etc.), and interpretation and telling the story of curry in the Bradford area.
Guided tours	Develop a database of potential guides that can work with / be booked by the travel trade, along with a number of sample itineraries for the district. These would be for both walking and

	coach tours. Developing Bradford product is a priority.
Training	Develop and roll out a programme of product familiarisation and product knowledge for front to of house staff in key visitor facilities (accommodation, attractions, cafes/restaurants, transport hubs, retailers etc).

8. The Destination Management Plan – Promotion and Information

8.1 Strategic Need

Effective marketing is based on presenting the right product to the right market. As explained in section 3, the area has a diversity of products and markets which means that a 'one size fits all' approach will not be effective. With the advent of digital marketing techniques, it is now more affordable and realistic to reach specific markets with distinct messages – and this is the necessary approach for the Bradford district.

Section 6.1 identifies potential target markets for the area. These will require both different messages but also different channels of communication. An overview of the channels required to reach these markets is summarised in appendix 6.

There are a number of crosscutting principles that should underpin the destination marketing approach. These include:

- Building **awareness** of the district and the wealth of its options. Perceptions and awareness are challenges (section 4.2) – over time these need to be addressed.
- Focusing on **the market and experience**. Markets are becoming more focused on experiences and less on places. This is particularly the case for a destination like Bradford district where awareness is not strong and perceptions can be negative (see above). The sales pitch in marketing needs to be about specific activities and itineraries (ideally focused on specific markets).
- **Dynamic** marketing – digital media allow for (and require) dynamic content. Experiences and itineraries that are proactively pushed (on the web, and through social media) should be changed through the year – reflecting seasons, what's new and fresh (e.g. events and festivals) etc.
- **Upsell** and **cross sell** the destination – promotion of specific experiences should focus on upselling something else in the district – e.g. a walk on Ilkley Moor and a cup of tea in Bettys or pint in the Bar Tat – or cross-selling e.g. 'like Salt's Mill, you might like Cartwright Hall'.
- Keep it **simple** and make it easy – experiences and itineraries need to be simple (e.g. based around a half day or 24 hour option) with only a limited number of options. Too much information is counter-productive.
- New ways of delivering **in-destination** information. Historically in-destination information provision in the district has been based around largely reactive Visitor Information Centres and print. More dynamic and proactive models need to be adopted in the future.

8.2 Activities and actions

The following table outlines potential areas of destination intervention for the visitor economy over the next five years.

Activity	Description and action
Experience and itinerary development	Develop content on experiences and itineraries that are focused on the different target markets. These should focus on half and one day (and possibly two+ days) itineraries and focus on key potential experiences – with cross-selling and upselling opportunities (see above). Itineraries should also be potentially tactical – reflecting events and seasonal opportunities.
PR activity	Press activity (including broader activity including travel bloggers) will be key to both developing awareness but also supporting tactical opportunities (e.g. events) and a coherent campaign needs to be developed through a range of activities including familiarisation trips. This should target bloggers, specialist publications and the local press, and also regional and national press (which will have continued importance for some markets).
Website	The destination should have an enhanced and dynamic website which is visually engaging and leads with a series of experiences/itineraries that regularly change (see above). Behind the experiences there needs to be the comprehensive listings on visitor related facilities that the VisitBradford site currently features – ideally these need to be more curated to make it easier for the visitor. The site also needs to be designed in a mobile friendly way.
Social media	Developing a social media strategy is of key importance, particularly for younger market segments, and for promoting tactical opportunities like events. The campaign should feature competitions, quiz, prizes for best photos etc. and be conducted across a range of different social media platforms.
A programme of managing third party content	Third party travel sites on Online Travel Agencies (OTAs) (such as TripAdvisor, Booking.com) have huge importance in the market place. They provide opportunities for the distribution of content and itineraries, and an ongoing programme of activity should be developed.
In-destination print – focusing more on the specifics	Print should focus more on an in-destination role providing detailed suggestions and practical information for visitors in the area (like, e.g. the current Saltaire Guide). Initially it is suggested that guides are produced for the four areas of Bradford, Haworth, Saltaire and Ilkley.
Tactical campaign activity	Campaign related activity (i.e. a focused set of promotional activity on specific product or market involving print, PR, advertising etc.) is likely to be undertaken on an ad-hoc basis as

	opportunities arise (e.g. Northern Growth Fund activity with Leeds). One area of campaign activity would be a 'Discover Your Doorstep' campaign targeting families and other residents (and by extension the VFR market) in the West Yorkshire and North Yorkshire areas. This would feature a range of activities (see above and appendix 6). It could, in time, be developed on a West Yorkshire basis.
Database development	Developing databases of markets, particularly travel trade, will be an important part of the marketing approach. All digital activity (especially) social media should be orientated at capturing user contacts.
In-destination information	As in-destination information moves away from VIC services, alternatives should be explored and developed (as e.g. part of local management plans). These could include partnership activities, pop-up VICs, and in-destination print and a mobile friendly website (see above).

9. The Destination Management Plan - Facilitation and Partnership

9.1 Strategic Need

The visitor economy in the district is not working as a coherent whole – partnerships across the district and within specific areas are quite weakly developed. While there are valid reasons for this – changes in personnel over the years, a loss of momentum of activities, and, in some areas, a lack of critical mass of operators.

However, moving forward the visitor economy sector needs:

- Leadership in terms of an organisation or group that will drive the Destination Management Plan forward.
- Greater private sector involvement in decision making and implementation, and funding destination related activity
- To work in a wider context in terms of:
    - Working with other interests (planning, regeneration, place marketing, WHS management, events, culture etc.) across the district to ensure a holistic approach to the visitor economy is adopted;
    - Work beyond the district's boundaries with other destinations (Leeds, and West Yorkshire, the Dales and Harrogate) and operators, and with Welcome to Yorkshire to provide and promote customer focused experiences.
- Facilitate and enable partnerships to work locally and develop initiatives together;
- Improve market and product intelligence.

VisitBradford should be the **lead organisation** for the implementation of the DMP. There are a number of options for this. It could:

- Stay as it is – i.e. a section within Bradford MDC;
- Become a separate (or arm's length) public / private sector organisation. This is a risky (and potentially time consuming option) since the scale and nature of the private sector means this may not be financially viable;
- Form part of a wider city centre group (e.g. the Make it York, or CV1 model) within Bradford MDC. This would be dependent on wider re-organisation but would have the advantage of closer linkages with, for example, city centre management and events development. However, the danger is it becomes too city centre focused to the detriment of the wider district.

9.2 Activities and actions

In the short to medium terms (i.e. next five years), VisitBradford should either stay broadly as it is, or form part of a wider city/district place development and marketing team.

The destination plan will need to be 'owned' and implemented in partnership with other organisations. A successful model will be likely to have:

- A steering group for DMP implementation.
- A new approach to working with other BMDC departments / units (e.g. City Centre Management, Events team) and to working with regional partners like Leeds City Council and other West Yorkshire authorities, on specific campaigns (particularly around the 'Discover your Doorstep' campaign) with a view to maximising joint budgets and potential Bradford District return on investment.
- A more pro-active approach to maximising the potential opportunities for gaining more impact within existing Welcome to Yorkshire programmes – particularly in digital programmes, and benefiting from their high level of social media engagement and travel press activity.
- Development of local groups (or working more closely with existing groups) with a brief to develop local management plans, develop itineraries and identify tactical opportunities for content (like events). Although, this should not lead to a proliferation of too many groups with no real agenda - where there are groups these need to be action focused, with a 'start and finish' programme.

Appendix 1: Market and consumer trends

- **The continuing "Staycation".** The economic downturn led to a change in holiday behaviour and attitudes, with leisure becoming ever more important even as finances were stretched. The increase in domestic trip taking and parallel decline in overseas travel was initially driven by cost, but many other factors have contributed to the continuation of the trend – including a preference for multiple short breaks over the year, risk aversion, last minute planning, more deals and offers available through online travel agents and daily deals sites, hotel and visitor accommodation development and improvement, including a number of new accommodation products that have captured the market's imagination and new visitor attractions, events and festivals. In the short term, the staycation effect is likely to remain.

- **Economics and recession-led trends.** In the longer term, holiday taking patterns are unlikely to revert to pre-recession patterns – for some people behaviours have changed fundamentally, while others have discovered and genuinely enjoy breaks in England. There is however an ambition to have long holidays abroad, which people will do when they can afford to. There is also likely to be a continuation of recessionary spending patterns even after recovery (and especially among younger generations) – this means more emphasis on deals, offers and added value packages. However, recessionary experiences (and therefore recovery experiences) differ among consumers – some consumers have experienced increased spending power, others the opposite.

- **Other recent domestic tourism trends** include:

    - Turning VFR trips into leisure ones. The driver behind this has partly been economic (see above) but other drivers exist which may mean the trend may continue – these include maximising leisure time, and the changing demographic picture (creating more opportunities for family get-togethers).
    - Domestic tourism can benefit from wider trends – e.g. health tourism (spa breaks) and active / adventure tourism. This will be driven by a more active retired generation.
    - Rural and urban tourism have experienced strong growth in recent years. Both destination types can benefit from the growth in short breaks, with an opportunity to combine breaks (rural and urban).

- **Domestic visitors are often creatures of habit** -two thirds of people booking a UK destination do not consider another destination – 93% of these will have visited that place previously. Four fifths are not influenced by any advertising. Destination choice, especially for short breaks, tends to be driven by where someone lives – they will typically be looking at options in their immediate region (up to 2 hours away).

- **Population changes** include:
    - **An ageing UK population** – in the medium term the number of people over 65 is increasing. This generation is a powerful economic force, with sufficient time and disposable income to enjoy short breaks and regular holidays – albeit spending power can be threatened by declining values in pension plans and savings.
    - **Growth in younger generations** - while this is a potential opportunity for domestic destinations, it is also a challenge – this group is characterised by a lack of

knowledge and also prejudices about England and English destinations which prevents them considering these as holiday or break options. The Generation Y market also has very different requirements and expectations from hotels, accommodation businesses and destinations, with a greater importance placed on distinctive design, a relaxed atmosphere and a high level of technology and connectivity.

    - **A 'squeezed' middle generation –** the 35-49 age group is going to decline numerically. This group will be time poor with a potential consequence an enhanced desire for quality time and treats.
    - **Family composition** is also changing – with grandparents more involved in childcare (the 'Vertical Family'). This has implications with potentially more intergenerational family holidays and a need for appropriate products to cater for this. Similarly, the UK population is becoming increasingly **ethnically diverse** and this represents a market of increasing importance but one that is poorly understood.

- **Online booking and marketing** - Information technology and the ways in which consumers access tourism information have changed dramatically over the last twenty years - and continue to do so. The following are some of the key factors relevant to tourism information provision:
    - In general, the internet is the primary source of visitor information. Mobile (tablet and smartphone) are becoming increasingly important - particularly in terms of providing in-destination information.
    - There are a number of well-established internet players providing potential visitor information. These include Google, TripAdvisor, Online Travel Agents (OTAs) and booking sites (like Expedia, Last Minute, Booling.com, Late Rooms), meta-search engines (or aggregators like Trivago and Kelkoo) deal sites (Groupon, Wowcher), and the 'Sharing economy' (AirBnB).
    - Destination sites are only one of these - they tend to be used at the planning stage of the customer journey.
    - Different market groups (life-stages) will plan their trips in different ways - some groups will often leave their trip planning to the 'on-the-move' / in-destination stages. There are differing attitudes to, and use of, digital and social media. The largest (and growing) group are 'info-seekers' who are actively using digital to seek and find information.
    - **Social networking will increase in importance** - online networks will be a vital channel for businesses for distribution, awareness creation and recommendations. Impacts of this include the amplification of negative experiences, disintermediation (consumers direct to businesses), fear-of-missing out' (FOMO), which means consumers want to share the experiences of their peers – they want to hear stories and have stories to tell and share.
    - The direction of travel in information provision is '**mobile first'** for all stages of the customer journey – particularly in terms of in-destination information. **Rating experiences, making information simple, and developing customised unique experiences** are also key trends in customer demands – For marketeers, there is need to convey the potential experiences quickly and visually. Wireless access on holiday and information in the right format will be key. Bookings will be more 'last minute'.

- **Tourism is becoming increasingly experiential** - tourists are looking for 'immersion' in a culture, unique experiences, authenticity, exploration, adventure and personal fulfilment from their holiday experience. The 'what' is more important than the 'where'. From a marketing perspective customising and personalising are key – different market segments want different experiences.

- Linked to this, as we, as a society, have become **more 'active'** (i.e. doing many things) we have created time pressures and a subsequent desire for control in our lives. This means a desire for greater simplicity in some of our choices and, linked to the technology trend, is the move to 'Individualocracy' and the desire for personalised products.

- While environmental concerns are not currently mainstream in terms of holiday taking decisions in the UK, for some markets, other consumer trends include **evolving ethical concerns** among consumers. These are now broader than more established environmental concerns and conspicuous forms of consumption have fallen out of favour (with an emphasis on consumers learning new skills and acquiring 'cultural capital' to distinguish themselves).

- **Inbound tourism** is forecast to grow in the UK. The Deloitte/Oxford Economics report for VisitBritain projects a 6.1% per annum growth in inbound tourism to the UK and an average real annual growth rate of just over 14% in overseas tourist spending in the UK through to 2025. Strong growth is expected to come from the emerging economies such as China, UAE, India, Brazil and Russia due to the increasing wealth of consumers in these countries. However the potential impacts of Brexit remain unclear – potentially visa arrangements, currency strength, cultural links and brand strength could all impact.

Appendix 2: Policy Context

Bradford City Plan Prospectus (Feb 2015)

This highlights importance of visitor elements – City Park, events National Media Museum (and Bradford City of Film), theatres, shopping in the city offer (and regeneration). It also highlights that:

- Bradford needs to have a secure distinctive role that is complimentary to neighbouring towns and cities.
- Develop a clear offer that plays to our distinctive assets and strengths
- Provide the leisure services and facilities that businesses, customers, residents and visitors demand

Five point plan which is based around Bradford City Centre as:

- A Place of Dynamic Business & Entrepreneurship
- A Centre of Excellence for Learning
- An exemplar of 21st Century Urban Living
- A Major Transport Hub
- A Destination & Experience

Transport hub highlights the need to develop a modern pedestrian way-finding strategy in conjunction with city centre management, in order to improve legibility of the central area. As a city centre, the plan identifies key elements as cultural resources (the NMM, Alhambra Theatre, St. George's Hall, UNESCO City of Film Designation), festivals, the Asian influence (in restaurants and retail), and the backdrop of Victorian architecture. The challenge is to develop the city centre as a key visitor attraction and overcome negative perceptions of Bradford.

There is a need to:

- Better understand the performance of the city centre as a visitor destination;
- Develop a more coordinated approach to the management and marketing of the city centre;
- Continue to invest in the public realm and ensure good connections between the city centre's component parts;
- Encourage a good balance of mainstream and independent traders to distinguish the retail offer so that it can compete with other retail destinations and with online shopping;
- Develop the evening economy;
- Ensure a rich programme of events and leisure opportunities; and
- Continue to encourage new cultural and visitor attractions.

The vision is identified as 'Bradford city centre will be a destination of choice for leisure and shopping for residents of the district, with a unique and attractive offer which is distinctive from other centres. The city centre will welcome visitors from the UK and overseas, who will be attracted by its rich cultural offer, excellent services and vibrant street life'.

This will be predicated on an attractive retail experience, a thriving evening economy which attracts all types of visitors including families, a world class, vibrant cultural experience, and a local regional, national and international reputation.

Key actions will include:

- Establish a retail strategy for the primary shopping streets and highlight those areas where comparison retail activity should be focussed. To include plans and proposals for the future markets offer in the city centre.
- Reinforce the 'Top of Town' as an important convenience and independent retail destination, and as a key arrival point with excellent public transport connections, car parking capacity, and accessible public realm.
- Manage and maintain the city centre to the highest standards. Develop a Destination Management Plan with partners
- Work with centre managers, retailers and businesses to develop an Evening/ Night time Economy Strategy that is family friendly and appeals to all.
- Seek to grow the cultural offer in the city centre including the redevelopment of the Odeon as a large modern music venue; the refurbishment of St George's Hall as a concert venue, and the delivery of a new city centre based sports facility. Work to attract more privately run and commercially sponsored events and facilities.

Airedale Corridors - A Masterplan & Strategy for Airedale (Airedale Partnership)

Focus on Keighley, Bingley and Shipley. The Masterplan identifies, within the Lifestyle corridor theme, that components for the town centres include the development of high-quality leisure and cultural facilities within the town centres. Components for tourism development include:

- Co-ordinated marketing and promotion of destinations with online booking and payment;
- Provision of high-quality hotel accommodation in three town centres to encourage overnight stays for tourists and business users alike, with provision of conference and leisure facilities;
- Concentrated development of the tourism product at the three key destinations of Saltaire World Heritage Site, Keighley and Worth Valley Railway and Haworth.

The Masterplan makes a number of recommendations of relevance to tourism development including:

- Enhancements to the rural landscape.
- Development of a high-quality hotel with conference, leisure and restaurant facilities, and an Arts Centre in Keighley

In terms of Saltaire, the plan highlights that the historic contexts provided by the village, the park, the canal and Airedale itself provide a vital context for Salt's Mill, but do not in themselves offer much to the non-specialist visitor. There is a need for change (rather than fossilisation) within the village. The plan proposes:

- The development of a hotel between Shipley and Saltaire, on the Saltaire Road.
- Refurbishment of Roberts Park
- Development of a visitor and interpretation centre located on land at Caroline Street between the new hotel and the Mill.

Saltaire WHS Management Plan 2014 (Bradford MDC)

This recommends a number of actions including:

- Improving signage to and within the World Heritage Site and deliver better interpretation
- Exploring the feasibility of a major new community arts building

- Exploring the feasibility of creating and interpreting an historic residential property open to the public
- Developing a distinctive tourism offer for the Site which complements and delivers on CBMDC's Cultural and Tourism Strategy objectives
- Carry out regular relevant and bespoke visitor research
- Conduct a feasibility study into the development of B&B and hotel accommodation in the immediate setting of the WHS

Bradford a Leading Cultural City 2014-2024 (Bradford Cultural Strategy)

The Vision is of 'A leading cultural city that people love and enjoy'.

Diversity is a key theme of the strategy. The Cultural strategy is built on five strategic priorities:

- Priority 1: Investing in our People - A District where people can freely access, enjoy, create, engage in and contribute to Bradford's cultural offer.
- Priority 2: Building a resilient and sustainable sector – Create an agile, enterprising, and entrepreneurial creative and cultural sector.
- Priority 3: Responsible and active Leadership – A 'can-do' leadership position at all levels that engenders ownership, responsibility and ambition.
- Priority 4: A thriving cultural offer – One that inspires our residents and visitors and delivers a magnificent cultural experience for all.
- Priority 5: A cultural destination – telling and selling our story – Encouraging people to actively take part, watch, engage and experience Bradford as a leading cultural city locally, nationally and internationally.

Key points within these priorities include:

- Training, and supporting people to position Bradford as a leading cultural City – i.e. a focus on the experience and not just on marketing
- Developing a thriving cultural offer through developing a **Festival City.** Promoting the wealth of nationally renowned festivals (such as Ilkley Literature Festival, Bradford Animation Festival, Bradford International Film Festival, the MELA, Saltaire Festival and World Curry Festival) as part of an annual calendar will be a starting point to establishing the district's festival offer but there is an aspiration to deliver an iconic festival for the district.
- Addressing the 'whole' experience – for example, investing in parking and transport; bars and restaurants and shopping will create a better holistic experience during leisure time.
- Culture will be used as a distinctive vehicle for re-positioning Bradford as an appealing City in the minds of residents and visitors. The intention is by 2024 that Bradford District is positioned as a leading cultural city in the UK - a City that is front of mind as a cultural destination. Part of this includes:
    - Building audience intelligence and an understanding of what residents and visitors want
    - Improve marketing of place across the district. The council, cultural sector and communities need to work together to build collaborative approaches to reaching and persuading audiences and visitors to engage, concentrating combined resources on the best opportunities to develop campaigns that are fully integrated and impactful.

Appendix 3: Product Offer

Product element	**Product offer – by area.**				**Stand outs**
	Bradford City	**Saltaire, Baildon, Bingley**	**Ilkley and Wharfdale**	**Haworth and Keighley**	**Stand outs**
Countryside / outdoor activity		Walkers are Welcome (Baildon and Bingley) Baildon (and Baildon Moor) Aire Valley Towpath Airedale Greenway Bradford's Millennium Walk	Ilkley Moor (and others) Wharfe Valley Walkers are Welcome (Burley in Wharfedale) Tour De France route Dales Way / Dales High Way Bradford's Millennium Walk	Haworth Moor The Bronte Way Bradford's Millennium Walk Great Northern Railway Trail Calder Aire Link (cycling)	Ilkley Moor Haworth Moor
Arts and Culture	National Media Museum and IMAX City Of Film (and Film Heritage) Alhambra (regional theatre) St George's Hall Cartwright Hall (Inc Hockney Gallery) Impressions Gallery Kala Sangam	1853 Gallery (and Hockney)	King's Hall and Winter Gardens	Bronte Parsonage Museum	Hockney National Media Museum Bronte Parsonage Museum
Heritage	Bradford Industrial Museum	World Heritage Site (inc distinct architecture)	Manor House (closed)	Bronte Parsonage Museum	Bronte Parsonage Museum

	Bolling Hall Bradford Cathedral Peace Museum	Salt's Mill Shipley Glen Tramway		Keighley and Worth Valley Railway East Riddlesden Hall Cliffe Castle Museum and Gardens The Police Museum	Saltaire (WHS and Salt's Mill)
Environment and Towns	Mixed – superb architectural heritage and buildings (e.g Little Germany, City Hall), City Park but also blighted by poorer architecture in many places	Saltaire village - WHS	Iklely - attractive Victorian spa town	Strong sense of place in Haworth and attractive village	
Retail	Broadway and city centre shopping – typically budget to mid high street brands	Salt's Mill and independents with visitor appeal in Saltaire	Mixture of mid to designer high street brands and independents	No. of independents, particularly at top of village.	
Family	National Media Museum and IMAX City Park	Shipley Glen Tramway Cycling	Ilkley Lido Toy Museum	Keighley and Worth Valley Railway	National Media Museum
Accommodation	Nearly 1400 rooms – mix of 3/4 star (BW Cedar Court, Midland, Great Victoria, Bradford) and budget/2* (e.g. Jury's Inn, Campanile). Majority (about two-thirds) are budget/2*.	Nearly 500 serviced rooms concentrated in small number of hotels (e.g. Mercure Bankfield, Marriott Hollins Hall, Ibis Shipley, Premier Inn Bingley).	Approx 150 serviced rooms – inc. 3* Craiglands and Rombalts	Approx 80 serviced rooms mainly in smaller independents (exception is the Travelodge Keighley) plus approximately 75 self-catering properties (the majority of the District's supply).	
Conference and	Various small / medium				

business	sized venues				
Events and festivals	Bradford Festival, Bradford Literature Festival World Curry Festival Mela Festival City park Events	Saltaire Festival Bingley Music Live	Ilkley Literature Festival Ilkley Summer Festival Ilkley Arts Trail South Pennines Walk and Ride Festival Wharfdale Music Festival	Haworth 1940s Weekend 1960s Weekend Steampunk Weekend	
Food and drink	Curry North Parade / West End Bradford Brewery	No. of independent cafes and bars Brewing - Saltaire	Good range of cafes / tea shops, restaurants and modern bars Brewing – Ilkley	Beer and Brewing – Tim Taylors, Gosse Eye, Naylor's, Old Bear	Curry
Other	Multi-cultural city Sport – Bradford Bulls, Bradford City FC Film		Tennis Club		

Appendix 4: Bradford in the Guide Books

Guide	Highlights	Feature	Quotes
Rough Guide England	Has a '30 things not to miss' section which includes Haworth and Bradford Curry. These are two of the eight Yorkshire highlights	'Bradford and around' has about 2 pages. This features the National Media Museum, Saltaire and Salt's Mill'. Haworth has its own section – about a side which highlights the Bronte Parsonage Museum. Ilkley is in the Yorkshire Dales section. It has about a side of coverage featuring All Saint's Church, Ilkley Moor and the Manor House Museum	'The main interest in the centre of Bradford is provided by the National Media Museum' 'The city's extraordinary attraction of Saltaire' 'The small town of Ilkley holds a special place in the iconography of Yorkshire out of all proportion to its size. Vibrant and stylish, Ilkley has plenty to see.'
The Lonely Planet England	The guide has a top experiences in England - no Bradford mentions. Within the 'Yorkshire Highlights' there are seven places mentioned include: • Haworth • National Media Museum	Bradford and Saltaire are featured in the 'Around Leeds' section. Each has about half a page. • Bradford elements that are highlighted include Bradford Mela, National Media Museum, ImaX, City Park, Bradford Curry Guide. • The Saltaire section focuses primarily on Salt's Mill but also mentions guided walks. Haworth has its own section - nearly three sides with a map. This highlights walks, Haworth Parish Church, KWVR, and Bronte Parsonage Museum.	
Berlitz Great Britain	Has top 25 GB - no Bradford mentions	Less than half a page on Bradford. Includes: • Salt's Mill • National Media Museum Bronte Country also get a separate mention (under north from Leeds section).	Haworth 'scorched in summer, lashed by rain and wind in winter, this atmospheric place is home to the Bronte Parsonage'

Appendix 5: Market Segments

Segment	**Coach Operators and Group Organisers (UK)**
Characteristics	UK market comprising retired groups (65+), clubs and societies. Typically within a 2 hour catchment area (Yorkshire, Gtr Manchester, Lancashire, East Midlands, West Midlands). Visiting for the day and overnight.
Rationale	Bradford district is attractive to this market and has the potential to develop it further. It is relatively easy to reach and is potentially influenceable with attractive packages and the right product. However, while representing a relative high volume market, it is not necessarily high yield and ideally should be targeted for off-peak periods. Cross selling other products / itineraries to increase length of stay in the district will also be important – e.g. Haworth and Saltaire (not just one of them).
Essence of the offer	Core elements of the offer for this market will be: • Attractive rates (particularly hotels) • Location and accessibility (within the north of England / UK) • Combination of high profile products and attractive countryside.
Potential key areas and products	Examples include: • Haworth and Bronte Parsonage Museum • Saltaire and Salt's Mill • Ilkley – Ilkley Moor, Bettys, shopping • Alhambra (show specific) • Special interests themes – literature, Hockney, industrial heritage, faith and tolerance, railways and film locations.

Segment	**Overseas coach tours**
Characteristics	Inbound tour groups looking at UK highlights. Typically first time visits to the UK and likely to be older age groups. Key markets will be South East Asia (China, S. Korea), and North America. Day visiting but also overnight. More likely to be visiting in peak / shoulder periods.
Rationale	Like the domestic market, Bradford is potentially attractive to this market, and it can be influenced and has the potential for growth.

	The emphasis should be on securing overnight business (focused on Bradford) and increasing activities and spend (particularly within Bradford city centre).
Essence of the offer	• Good value overnight stay as part of UK tour • Location and accessibility (within the north of England / UK) • Combination of high profile iconic products in the immediate area (Haworth) and within an hour (e.g. York) • Added experience – e.g. evening special interest tour/talk, themed dinner.
Potential key areas and products	In the short term primary areas / attractions will be Haworth and Saltiare but supported by: • Local guide/welcome service • Special interest themes and study tours – multi-culturalism, faith, peace etc

Segment	**Families**
Characteristics	Younger families (with children aged up to 12-14 years). This will be primarily a day visitor market, typically from Bradford district itself and West Yorkshire but also potentially from further afield. It may be accompanied by a VFR market. Families will have a spectrum of socio-economic characteristics (and will include 'Vertical' families). The defining characteristic will be time with, and entertaining children.
Rationale	Families are one of the key markets for a range of products in the destination. There is scope to grow this further from the local and regional catchment area. In addition to growing volume there is potential to increase length of stay and therefore spend, attracting this market will (particularly from local visitors) create a sense of pride in the local area, and increase knowledge of what the area has to offer for recommendations, VFR, social media activity etc
Essence of the offer	• Family day out – time with the kids • Entertaining, educational and healthy • Value for money • Attractions, events and festivals, special open days and guided tours
Potential key areas and products	• Core family orientated attractions like National Media Museum, Bradford Museums, Keighley and Worth Valley

	Railway, Shipley Tramway etc • Events and Festivals • Outdoor activities – parks, Shipley Canal, Ilkley Moor etc.

Segment	**Active Indulgents**
Characteristics	This is a domestic market that will undertake day trips and short breaks. It will be predominately be older couples (45/50+), travelling without children (but may include younger age groups), typically from higher socio-economic groups (ABs). Day visitors will be primarily from West and North Yorkshire but also from Lancashire/Gtr Manchester. Overnight visitors will also come from these areas and will also come from a potential 1½ to 2 hr catchment (the north and north Midlands). They may combine elements of a Bradford visit with activities in the wider area (e.g. the Dales, Harrogate, South Pennines).
Rationale	This is a high spend market with disposable income and, in many cases, time. Bradford has good product to attract more of this market. There is potential to increase more lucrative overnight stays from this group, with the right offer.
Essence of the offer	This market will have two key drivers – including: • Activities and experiences (albeit not necessarily in an explicit way) – these will be a combination of 'learning' experiences (i.e. heritage, and cultural sightseeing, attractions and events), and countryside and outdoor activities (a walk, bike ride). While, the balance will vary between individual groups this segment is not purely about outdoor physical pursuits (at least not on this trip). • Indulgence – the trip will also be indulging /treating ones self – e.g. eating and drinking in a quality bar / restaurant or café/tea shop, staying in nice hotel / cottage, quality shopping.
Potential key areas and products	All areas of the District have the potential to attract these visitors – key elements could include: • Haworth, the Brontes and walking. • Saltaire And Salt's Mill • Ilkley – Ilkley Moor or the Wharf Valley , shopping, cafes and restaurants Aside from events, Bradford's offer is not currently as strong for this market but potential products include the National Media Museum, Impressions Gallery, Cartwright Hall. It also offers a potential accommodation for the wider area (e.g. Midland Hotel, Great Victoria Hotel).

Segment	Young explorers
Characteristics	This is a domestic market – primarily day tripping from the West Yorkshire area but also from further afield (with some staying visitors). They will be under 35, and either single, couples, or groups of friends. Typically they will be higher socio-economic groups (graduates / young professionals). They might be familiar with the area – from personal knowledge, friends, or may have previously studied in Bradford. They are more likely than other segments to be travelling by train.
Rationale	This market has growth potential, generating additional spend. It is also a potential ambassadorial role – helping to promote Bradford and put it on the map, and support Bradford's independent quarter.
Essence of the offer	• Somewhere different to visit • An authentic and eclectic experience • A combination of cultural activities and nightlife
Potential key areas and products	This segment will be primarily focused on Bradford and Saltaire. Key products will include: • The National Media Museum – particularly the Imax and temporary exhibitions • Festivals and gigs – music, film, literature • Salt's Mill • Curry • North Parade, Sunbridge Wells and the West Ends • (Potentially) the Odeon

Appendix 6: Market Segments – marketing approaches

The following table outlines potential marketing approaches to different market segments

Market segment	Overview of potential activities
Coach Operators and Group Organisers (UK)	• Develop databases of clubs and societies and coach operators • Develop suggested itineraries, combining attractions with tours of Bradford district, film and TV links and special interest themes • Produce A4 leaflet/PDF, with itineraries, package prices, maps of coach parking, drop off points and driver facilities • Organise familiarisation visits for coach operators and organisers (via dedicated media and magazines) • Mailing to database with leaflet, fam visit invitation etc • On-going PR programme in trade and specialist press • Provide welcome service at key attractions with souvenir leaflet and map and offers for repeat visits
Overseas coach tours	• Develop database of existing and potential incoming tour operators via UKInbound and relevant attractions • Contact via email and social media with special offers, incentives, new coach facilities, meet & greet • Develop web pages (downloadable page) with itineraries and services • Work with Welcome to Yorkshire and VisitBritain to feature content on relevant sites and via marketing activity programmes – including features in translated pages
Families	• Local Press, radio and TV coverage - and neighbouring area –including editorial and advance features with advertising support • Develop day out itineraries – e.g. 5 best days out for kids differentiated by age (e.g. pre-school, primary, early teens) • Promote online and on third party websites (family days out, Mumsnet, etc.) • Social media campaign – featuring competitions, quiz, prizes for best photos etc • Print 'On your doorstep' featuring days out, how to get around, special offers, festivals – possibly on a district or West Yorkshire basis. • Tactical leaflet inserts in local newspapers and wide distribution via commercial company (covering seasonal things to do, events etc.) • General leaflet' available all year round, regular distribution.

	• Collect contact details for on-going promotions of events, special offers etc. and encourage sign up on social media
Active Indulgents	• Development of suggested online experiences/itineraries for half, one and two+ days – geographical and easy to follow e.g. Saltaire- plus, Haworth- plus, Ilkley- plus etc) • Local / regional press and national press via W2Y • Content provided to travel bloggers, 3rd party websites, OTAs etc. • Feature on dedicated pages on Visit Britain website
Young explorers	• Curated content on social media and interest apps (e.g. film etc.) • Local / regional and regional listings (e.g. Bradford Review) • Mainly word of mouth on social media, re-tweeting and 'likes' • Photos, films and blogs • VFR via university websites, reunions etc. • Links from IMAX films, evening offer packages etc. • Via places to stay and online links e.g. Airbnb hosts, rental cottages, hostels etc.
Events	Events will typically have their own marketing strategies. However, for key events destination activity could include: • Itineraries on destination website • Including in 'On your doorstep' print • PR and social media activity