Shropshire Hills & Ludlow DDP Marketing Strategy

Commissioned by Shropshire Council and compiled by Shropshire Tourism (UK) Ltd with contributions from Shropshire Hills & Ludlow DDP

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EXECUTIVE SUMMARY

Building on the DDP's approved Sustainable Tourism Strategy and Action Plan drawn up by The Tourism Company with Alison Caffyn, Shropshire Tourism has been commissioned by Shropshire Council to develop a marketing strategy and action plan for Shropshire Hills and Ludlow (the Destination Development Partnership, DDP).

The marketing brief identified the main objective of the marketing strategy for the Shropshire Hills & Ludlow as being "to grow tourism spending year round and throughout the area." The Shropshire Hills & Ludlow DDP state that this marketing strategy is also informed by the primary aim of the Sustainable Tourism Strategy "to develop, manage and promote the Shropshire Hills and Ludlow as a high quality sustainable tourism destination, in keeping with its focus on a designated Area of Outstanding Natural Beauty", and the Strategy's principles including building an integrated destination linking the towns and hills. The DDP itself currently does not itself undertake or commission marketing directly. The strategy therefore needs to be a co-ordinating document, recommending how to make better value from existing activity, and suggesting possible areas for new marketing activity if budgets allow.

Using the available visitor data and research, Shropshire Tourism has provided a detailed analysis of Shropshire Hills and Ludlow's existing visitor markets and visitor information data with a view to identifying the top priority visitor markets and segments for Shropshire Hills and Ludlow within the day visitor, UK domestic staying visitor and overseas visitor markets.

A business survey was also conducted to see if there was a correlation between the visitor survey data and what the businesses themselves saw as their priority visitor markets.

Shropshire Tourism has also provided an overview of Shropshire Hills and Ludlow's main visitor products and offer that these priority visitor markets are likely to view as being most important and a key part of the visitor experience.

MAIN VISITOR MARKETS

The research identified the following key Day and UK Domestic Staying visitor market groups for Shropshire Hills & Ludlow DDP to focus its marketing efforts on:-

	Day Visitors	**UK Domestic Staying Visitors**
Main Geographic location	1. Shropshire 2. 1 hour drive time	1. West Midlands 2. London & South East 3. North West
Main Age Group	45 plus	45 plus
Main Type of Group	Couples travelling without children	Couples travelling without children
Main Socio- Economic profile	ABC1	ABC1
Main Activity	1. General sightseeing 2. Walking Countryside 3. Shopping	1. General sightseeing 2. Walking countryside 3. Other

Due to the size and spread of the overseas markets in the various visitor surveys, there is no recommendation being made at this stage for Shropshire Hills & Ludlow DDP to develop the overseas markets.

Based on the Arkenford segmentation model and research from Team Tourism, the following psychographic groups were identified as those which had the most suitable market profile and best product fit with Shropshire's tourism offer:-

- *'Traditionals'* - ABC1, aged 46 to 65. This more mature market, enjoy intellectual challenges, arts and culture, museums, churches, and historic sites. Enjoy experiences out of the ordinary, favour UK, enjoy short breaks and gardens.
- '*Discoverers'* – C1, mainly under 55, the most active day visitor market but are last minute deal takers and will consider short breaks in rural locations. They are higher spenders and enjoy a relaxed pace of life. They enjoy intellectual challenges but arts and culture are not an important part of their profile.
- *'Cosmopolitans'* - ABC1, age 42 plus, post-family, high income, urban based, active like arts, culture, shopping. Enjoy intellectual challenge and discovery, value peace and relaxation.
- *'Sightseers and Potterers'* (Day Visitors) - ABC1, 45 plus visiting as couples. Demographically broad in its characteristics, this group would be looking for a day out or to get away from it all enjoying the street scene and independent shops and food offer.

With all of these segments the majority of visitors will be travelling as couples. However, a proportion will be travelling in groups; family groups, groups of couples, as a club or society, or as part of a coach tour. The activities that they will be undertaking are likely to include cultural activities, walking and enjoying the countryside, pottering, shopping, eating out and general relaxation. Quality of experience in all aspects is essential for these types of visitor.

The Shropshire Hills & Ludlow DDP state that, within some parts of the DDP area, and for some of the partner organisations undertaking marketing, other markets which may be 'secondary' for the destination as a whole, are also significant. The secondary markets identified in the Sustainable Tourism Strategy of: families, walkers (of a wide variety of kinds), young actives and learners, justify an amount of targeted marketing in these circumstances, which should be complementary to that aimed at primary target markets.

SHROPSHIRE HILLS & LUDLOW'S PRIMARY DRIVERS

The report identifies the four primary product offers to visitors with supporting drivers as follows:-

Primary Driver	Supported By:
LUDLOW	Food & Drink Festivals & Events History & Heritage Shropshire Hills & the Rural Setting Other market towns and villages
SHROPSHIRE HILLS	Walking opportunities Unspoilt Scenery & Views, Wildlife Cycling, Riding & other Outdoor Activities Market towns and villages
FOOD & DRINK	Farms & Countryside Local food & drink Ludlow & Market towns
HISTORY & HERITAGE	Buildings & Places People, Connections & Culture Farming & Countryside

MARKETING STRATEGY

The strategy is seeking to increase the economic and social contribution that tourism can bring to the Shropshire Hills and Ludlow by growing market share of the primary visitor markets, attracting new visitor segments and increasing both visitor spend and dwell time.

Principal marketing activities relating to the Shropshire Hills and Ludlow are recommended to focus on:

Day visitors – who match the *'Sightseeing and Potterers', 'Discoverers'* and/or *'Traditional'* psychographic profiles, specifically from the socio demographic groups ABC1 aged 45 plus, travelling as couples without children from a maximum two hour drive time from Shropshire Hills & Ludlow.

UK Domestic Staying Visitors – who match the '*Traditionals', 'Cosmopolitan'* and/or '*Discoverers*' psychographic profiles: specifically aged 45 plus, and from the socio demographic groups ABC1 and travelling without children. These should be drawn from the primary geographic areas of London and the South East, North West and West Midlands.

In seeking to develop the identified target visitor markets for Shropshire Hills & Ludlow, it is recommended that the suggested marketing strategy should have three distinct priority marketing objectives:-

i). Raising Awareness of Shropshire Hills & Ludlow as a visitor destination worthy of consideration by the target markets.

ii). Presenting Shropshire Hills & Ludlow drivers, product and themes underpinned by the unspoilt rurality of the area as a compelling visitor 'offer' (experience) to these target markets, using a distinctive style and tone in all communications.

iii). Providing potential visitors with easy and clear routes to find further information about Shropshire Hills & Ludlow and ultimately 'purchase' the product.

It is recommended that the suggested marketing action plan should seek to deliver against these three priority marketing objectives.

The marketing action plan identifies a range of possible marketing activities under each of the individual Awareness Raising headings in section 1 identified in 'A Strategy and Action Plan for Sustainable Tourism in the Shropshire Hills and Ludlow', for consideration by the Destination Development Partnership and partner organisations.

An indication of their recommended priority ranking in terms of importance has been given, along with identification of likely lead and partner organisations. Their ultimate deliverability will be wholly dependent on the actual marketing resources available and should more resources become available then priority actions can be proportionally increased by volume and value i.e. more advertising, more brochure distribution, etc. or additional new activity can be conducted.

There is additional perception and motivational research currently being conducted by Arkenford, commissioned by Shropshire Council on behalf of the Marches Local Enterprise Partnership. The results of this latest research are due to be available after Christmas. It is therefore recommended that this should be fed into the development of the marketing messages and creative content as well as the final marketing action plan.

As a core part of the marketing plan, it is recommended that a marketing working group is formed by Shropshire Hills & Ludlow DDP to progress the strategy, including development of the Shropshire Hills & Ludlow brand and messaging, co-ordination and consistency of current activity and where appropriate commissioning expert input on marketing communications.

INTRODUCTION

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Using the available visitor data and research, Shropshire Tourism has provided a detailed analysis of Shropshire Hills and Ludlow's existing visitor markets and visitor information data with a view to identifying the top priority visitor markets and segments for Shropshire Hills and Ludlow within the day visitor and staying visitor markets. The DDP itself currently does not itself undertake or commission marketing directly. The strategy therefore needs to be a co-ordinating document, recommending how to make better value from existing activity, and suggesting possible areas for new marketing activity if budgets allow.

A business survey was also conducted to see if there was a correlation between the visitor survey data and what the businesses themselves saw as their priority visitor markets.

Shropshire Tourism has also provided an overview of Shropshire Hills and Ludlow's main visitor products and offer that these priority visitor markets are likely to view as being most important and a key part of the visitor experience.

Shropshire Tourism has compiled a list of recommended projects with a priority weighting that Shropshire Hills and Ludlow DDP and partners can consider further.

Additional visitor perception and motivation research has been commissioned by Shropshire Council on behalf of the Marches Local Enterprise Partnership. The results of this research should be available before Christmas. It is recommended that this additional insight is incorporated into the DDP's decisions and any future marketing activities.

SECTION 1: DATA ANALYSIS

Shropshire Hills & Ludlow DDP Research Analysis

Introduction

As part of developing the marketing strategy and action plans for Shropshire Hills and Ludlow Destination Development Partnership Shropshire Tourism conducted a detailed analysis of existing visitor survey data to collate visitor information with a view to identify the top priority market segments within the day visitor, UK domestic staying visitor and overseas visitor markets.

This analysis provided not only clear socio-demographic information on the main visitor types but also identified their primary geographic locations, the main activities they undertake and so on. The following visitor surveys were used:

South Shropshire District Visitor Survey

Commissioned by Shropshire County Council in June 2007 and conducted by the Research Solution
Sample size: 1,154

A total of 424 parties of visitors were surveyed. The average (mean) number of people per group was approximately 2.8 giving a total of at least 1,154 people included in the survey sample.

Interviewing was carried out at visitor destinations across the whole of South Shropshire including Cardingmill Valley, Ludlow Town Centre, Stokesay Castle and Church Stretton Town Centre.

Residents of South Shropshire District were not asked to participate in the survey, unless they were on an irregular leisure day visit lasting 3 hours or more. However, the survey recognises that a small proportion may have been interviewed inadvertently and included in the analysis and results.

Church Stretton Destination Benchmarking Survey

Commissioned by Shropshire County Council in June 2007 as part of Better Welcome and conducted by the Research Solution
Sample size: 485

A total of 200 parties of visitors were surveyed during the survey period. Nearly all (199) provided demographic data on their group. The average (mean) number of people per group was approximately 2.4 giving a total of 485 people included in the survey sample.

Interviewing was carried out at Easthope Car Park, Stretton Antique Market, West Midlands Co-op, VIC, Flinders Café and The Outdoor Depot.

Ludlow Destination Benchmarking Survey

Commissioned by Shropshire County Council in June 2007 as part of Better Welcome and conducted by the Research Solution
Sample size: 511

A total of 206 parties of visitors were surveyed and provided demographic data on their group. The average (mean) number of people per group was approximately 2.5 giving a total of 511 people included in the survey sample.

Interviews were undertaken at the Market Square, VIC, St Laurence's Church, Ludlow Castle Gates, Castle Square Car Park.

Bishop's Castle Destination Benchmarking Survey

Commissioned by Shropshire County Council in June 2007 as part of Better Welcome and conducted by the Research Solution
Sample size: 526

A total of 201 parties of visitors were surveyed and provided demographic data on their group. The average (mean) number of people per group was approximately 2.6 giving a total of 526 people included in the survey sample.

Surveys were undertaken at the Town Hall/Market Square, Post Office (Church Street), Castle Hotel Gardens, Six Bells Yard and Three Tuns Inn Yard.

Shropshire Tourism also surveyed the tourism industry in Shropshire Hills and Ludlow to gather their views on what they see as their priority visitor markets. The results of the Tourism Business Survey are summarised and compared alongside the results of the visitor surveys.

Shropshire Hills Area of Outstanding Natural Beauty Visitor Survey

Commissioned by Shropshire County Council between June and September 2007 and undertaken by The Research Solution.

Interviewing was carried out at The Wrekin, Cardingmill Valley, The Bridges, Clun Castle, The Bog Centre and Church Stretton Town Centre. (N.B. The majority of interviews were carried out at The Wrekin and Cardingmill Valley).

Collated Visitor Surveys:

Drawing all the visitor survey data together gave a total survey sample of 3,623 visitors. This is broken down as follows:

- Day visitors: 2,462 (68%)
- Staying visitors: 995 (27%)
- Overseas visitors: 166 (5%)

The Tourism Business Survey:

Shropshire Tourism sent a business survey out to 466 businesses drawn from the main tourism sector (accommodation providers, attractions and event operators) and selected retail and catering businesses.

The purpose of this smaller industry survey was to see if the business operators' own experience of their own visitor markets corroborated the main visitor survey findings and to help identify any significant differences between the two sets of data. By comparing the two sources of data alongside each other we are able to see if the findings of the collated visitor surveys are borne out by the opinions of the business respondents.

The visitor surveys did not include any specific motivational research, however the businesses were asked what they thought in their opinion were the main motivations for each market.

Of the 466 businesses surveyed some 90 responded giving a response rate of just over 19%. The 90 respondent businesses/organisations were made up from the following sectors:

- Accommodation: 73%
- Attractions: 11%
- Other: 9%
- Retail: 2%
- Catering: 2%

Respondents by Type of Business

Accommodation	Attractions	Retail	Catering	Other
Self Catering: 42% B&B: 26% Hotel: 4% Caravan & Camping: 1%	Activity provider: 6% Gardens: 2% Entertainment venue: 1% Heritage property/stately home: 1% Countryside site: 1% Historic Site: 0% Farm attraction: 0%	Book shops: 2%	Cafe: 1% Other: 1% Restaurant: 0% Pub Inn: 0%	Event organisers: 2% Tourist Associations: 2% Chamber of trade: 1% Town Council: 1% Forestry Commission: 1% National Trust: 1 %

Day Visitor Analysis

	Day Visitors Survey	Business Survey Results
	Total sample size: 2,462	Total sample size: 90
		Respondents: 59
Geographic Location	1. within Shropshire: 32% 2. 1 hour drive time: 24% 3. 1.5 hr drive time: 11% 4. Longer: 6% 5. 2 hour drive time: 4% 6. 30min drive time: 2%	1. within Shropshire: 54% 2. Longer: 22% 3. 2 hour drive time: 12% 4. 1 hour drive time: 8% 5. 1.5 hour drive time: 2% 5. 30min drive time: 2%
		Respondents: 58
Age Profile	1. 55-64 years: 23% 2. 65+ years: 20% 3. 45-54 years: 19% 4. 35-44 years: 14% 5. 0-15 years: 13% 6. 25-34 years: 7% 7. 16-24 years: 3%	1. Age 55-64: 45% 2. Age 45-54: 26% 3. Age 35-44: 16% 4. Age 65+: 10% 5. Age 16-24: 3% 6 Age 25-34:0% and Age 0-15: 0%
		Respondents: 61
Type of Group	1. In couples: 64% 2. Family Group: 24% 3. As singles: 10% 4. Social Group: 1%	1. In couples: 66% 2. Family Group: 20% 3. Social Group: 13% 4. Educational: 2% As singles: 0%
		Respondents:59
Economic Profile	1. AB: 41% 2. C1: 31% 3. C2: 17% 4. DE: 10%	1. AB: 73% 2. C2: 20% 3. C1: 5% 4. DE: 2%

		Respondents: 58
Main Activity	1. General sightseeing: 31% 2. Walking countryside: 26% 3. Shopping: 15% 4. Visiting Attraction: 7% 4. Other: 7% 5. Food & Drink: 5% 6. Festival & Events: 4% 7. Cycling: 1% Sports: 0%	1. Walking countryside: 36% 2. General sightseeing: 24% 3. Visiting Attraction: 17% 4. Other: 14% 5. Shopping: 2% 5. Food & Drink: 2% 5. Cycling: 2% 5. Sports: 2% 5. Festival & Events: 2%

Notes:

Main Activity 'Other' includes:

South Shropshire District Survey: Visiting friends and relatives, painting, looking to buy a house and pub/drinking.
AONB Visitor Survey: Visiting friends and relatives, painting, looking to buy a house and pub/drinking. The percentage of those going to the pub/drinking is not given separately or these would have been included within Food and Drink.
Ludlow, Church Stretton, Bishops Castle Destination Benchmarking Surveys: Just passing through and visiting friends or relatives, for a specific purpose (e.g. bank/post office/chemist), to visit the TIC and to use the toilets and 'other' (no specifics given).

Day Visitor Summary

Geographic Location

The visitor surveys indicated that the majority of day visitors (56%) come from within one hours drive time or from within the county itself. Interestingly it also showed a significant percentage also come from within a one and a half hour drive time or longer. This could be due to the inclusion of touring visitors within the day visitor samples. The business survey bears out this finding.

Age Profile

The analysis of the visitor age groupings shows that the vast majority (62%) of visitors fall into the more mature age groups with an even split across the 55 to 65, 65+, and 45 to 54 age bandings with a fairly even split across the three age groups. The business survey placed a greater emphasis on the 55 to 65 age group with less on the 65+ segment. Both surveys showed that the 35 to 44 age group was also significant at 14% from the visitor survey and 16% from the business survey.

Type of Group

Couples made up the largest percentage of visitor groups at 64% of the visitor survey, with family groups at 24%. Singles represented some 10%. The business survey also showed couples as being the largest group at 66% with a similar emphasis on the family market as the visitor survey. Social groups also featured strongly in the business survey.

Economic Profile

The socio-economic group AB were by far the most dominant group in both surveys, with C1 also being important, together representing 72% of the market. As expected C2's feature more strongly in the day visitor surveys compared to staying visitor markets.

Main Activity

The visitor survey indicates that general sightseeing 31%, walking at 26% and shopping at 15% are the three main activities undertaken by day visitors. Visiting an attraction was only 7%. The business survey also identified the importance of general sightseeing and walking but suggested that shopping was less significant but visiting an attraction was more important. The business survey also highlighted some specific events and visiting friends and relations (VFR).

Business Survey - Day Visitor Motivation

In response to the question '*what is the main motivation for day visitors to visit?*' the businesses indicated that:

Main Motivation

1. Visiting the Countryside: 43%
2. Rest & Relaxation: 27%
3. History Heritage: 10%
& Visiting the towns: 10%
4. Other: 10%
5. Indulgence: 0%

Those who ticked 'Other' said:
Setting of film "Atonement" and original historic house (1 respondent)
Exploring Church Stretton Hills (1 respondent)
Walking (1 respondent)
I wish to tick MORE than one box on lots of these questions (1 respondent)
All of the above, sometimes a mix of the above (1 respondent)

Business Survey Day Visitor Future Markets

In response to the question *'Is there a new or emerging Day Visitor Market you intend to target in the future?'* Those businesses who responded made the following comments:-

No/not particularly (9 respondents)
Visitors to the home of the Olympics/Olympic related tourism (3 respondents)

Families (1 respondent)
Singles & Social Groups (1 respondent)
Readers of the books I write about Morville (1 respondent)
Motorcyclists (1 respondent)
Cyclists (2 respondents)
Horse riders (1 respondent)
Self catering doesn't really apply to us (1 respondent)
Retired Touring Caravanners (1 respondent)
Caravan Owners – we have introduced a caravan club certificated location (1 respondent)
As a B&B we don't have day visitors (1 respondent)

UK Domestic Staying Visitor Analysis

	Staying Visitors Survey	Business Survey Results
	Total sample size: 995	Total sample size: 90
		Respondents: 60
Geographic Location	1. West Midlands: 13% 2. London & South East: 12% 3. North West: 11% 4. East Midlands: 3% 5. South West: 2% 6. North East: 1% 6. Wales: 1% Northern Ireland: 0%; Scotland: 0%	1. London & South East: 47% 2. West Midlands: 42% 3. North West: 5% 4. North East: 3% 4. East Midlands: 3% South West: 0%; Northern Ireland: 0%; Scotland: 0 %; Wales: 0%
		Respondents: 65
Age Profile	1. 55-64 years: 23% 2. 65+ years: 21% 3. 45-54 years: 19% 4. 35-44 years: 14% 5. 0-15 years: 10% 6. 25-34 years: 8% 7. 16-24 years: 4%	1. 55-64 years: 45% 2. 45-54 years: 28% 3. 65+ years: 12% 4. 35-44 years: 11% 5. 16-24 years: 3% Age 0-15 years: 0% and 25-34 years: 0%
		Respondents:66
Type of Group	1. In couples: 64% 2. Family groups: 24% 3. As singles: 10% 4. Social Group: 1%	1. In couples: 70% 2. Family groups: 18% 3. Social Group: 11% 4. Educational: 2% As singles: 0%
		Respondents:63
Economic Profile	1. AB: 49% 2. C1: 33% 3. C2: 10% 4. DE: 7%	1. AB: 69% 2. C2: 23% 3. C1: 6% 4. DE: 2%
		Respondents: 66
Main Activity	1. General sightseeing: 27% 2. Walking countryside: 24% 3. Other: 23% 4. Shopping: 10% 5. Visiting Attraction: 4% 6. Food & Drink: 3% 6. Festival & Events: 3% 7. Cycling: 2% Sports: 0%	1. General sightseeing: 39% 2. Walking countryside: 30% 3. Visiting Attraction: 14% 4. Other: 6% 5. Festival & Events: 5% 6. Food & Drink: 3% 7. Sports: 2% 7. Cycling: 2% Shopping: 0%

UK Domestic Staying Visitor Summary

Geographic Location

The visitor survey and the Business survey both identified the three most important UK staying visitor markets for Shropshire Hills and Ludlow as being the West Midlands, London and the South East and the North West. The business survey put London and the South East top – this may be due to the number of accommodation businesses that responded to the business survey.

Age Profile

As with the day visitor survey the 45 to 65+ age group represented 63% of the staying visitor market with a fairly even split across the three age groupings. This was supported by the business survey. It is interesting to note that although smaller, the 35 to 44 age group was some 14% of the visitor survey. This may present an opportunity for future development.

Type of Group

As with the day visitor results, 64% of UK domestic staying visitors were travelling as couples or a group of couples usually travelling without children. The business survey also identified this as the main group type with 70% of visitors being in this group.

Economic Profile

From the visitor surveys AB's and C1's make up some 82% of the market, from the business survey this was also the majority of the market at 75%. At 17% of the total visitor market C2's and DE's are collectively important for certain types of business and product offers but as staying visitors may not generate the highest rates of return when compared to the more lucrative ABC1 markets.

Main Activity

Visitors will undertake a range of activities when staying in Shropshire Hills and Ludlow and will give multiple answers. In terms of main responses both the visitor and business surveys indicated General Sightseeing as a primary activity being undertaken by the UK domestic staying visitor, with walking in the countryside and 'other' - which included the VFR market, attending special events and specific festivals - as being significant.

Business Survey Motivation - UK Domestic Staying Visitors

Main Motivation

The business survey respondents were asked to identify what they thought was the main motivation for UK domestic staying visitors to visit Shropshire Hills & Ludlow. Their responses are as follows:

1. Rest & Relaxation: 39%
2. Visiting the Countryside: 37%

3. History Heritage: 10%
4. Indulgence: 4%;
   Visiting the towns: 4%
   and Other: 4%

Those who ticked ‘Other’ said:
A mixture of the above (1 respondent)
Combination of the above (1 respondent)
Christmas shopping and atmosphere (1 respondent)

Business Survey UK Domestic Staying Visitors Future Markets

Businesses were asked if there *‘Is there a new or emerging Staying Visitor Market you intend to target in the future?’* The 7 businesses who responded to this question suggested:

Visitors to Much Wenlock as home of the modern Olympics in 2012/Olympic related tourism (2 respondents)
Social Groups (1 respondent)
Those seeking adventure stays - such as walking or cycling (1 respondent)
"Green" or environmentally conscious tourism (1 respondent)
Those who wish to treat themselves whilst on holiday! (1 respondent)
Themed visitors following interest in TV documentaries (1 respondent)
Cyclists (1 respondent)
Retired Touring Caravanners (1 respondent)
Caravan Owners (1 respondent)

Overseas Staying Visitor Analysis

Note: The total overseas visitor sample at 5% is significantly lower than either the day visitor or staying visitor samples. Whilst they give interesting trend data, we would advise a cautionary approach in using the data findings on the overseas markets in developing long term marketing plans targeting these markets.

Overseas Staying Visitor Summary

	Overseas Visitors	Business Survey Results
	Total survey sample: 166	Total survey sample: 90
		Respondents:54
Geographic Location	1. Australia: 25% 1. North America: 25% 2. Other: 13% 3. Northern Europe: 12% 4. New Zealand: 10% 5. Southern Europe: 10% 6. China: 2% 6. Southern Africa: 2% South America: 0%; Scandinavia: 0%; India: 0%; Japan: 0%; Northern Africa: 0%	1. Northern Europe: 35% 2. Australia: 24% 3. Other: 19% 4. North America: 17% 5. New Zealand: 2% 5. Scandinavia: 2% 5. India: 2% China: 0%; South America: 0%; Southern Africa: 0%; Japan: 0%; Southern Europe: 0% and Northern Africa: 0%
		Respondents: 52
Age Profile	1. 45-54 years: 25% 2. 55-64 years: 22% 2. 65+ years: 22% 3. 35-44 years: 15% 4. 25-34 years: 8% 5. 0-15 years: 7% 6. 16-24 years: 2%	1. 55-64 years: 40% 2. 45-54 years: 37% 3. 35-44 years: 13% 4. 65+ years: 8% 5. 16-24 years: 2% Age 0-15 years: 0% and Age 25-34 years: 0%
		Respondents: 54
Type of Group	1. In couples: 70% 2. Family groups: 20% 3. As singles: 11%	1. In couples: 70% 2. Family groups: 22% 3. As singles: 4% 3. Educational: 4% Social Group: 0%
		Respondents: 51
Economic Profile	1. AB: 48% 2. C1: 28% 3. DE: 13% 4. C2:12%	1. AB: 69% 2. C2: 18% 3. C1: 10% 4. DE: 4%
		Respondents: 55
Main Activity	1. General sightseeing: 44% 2. Other: 17% 3. Shopping: 16% 4. Walking countryside: 11% 5. Food & Drink: 7% 6. Visiting Attraction: 2% 6. Festival & Events: 2% 7. Cycling: 1% Sports: 0%	1. General sightseeing: 58% 2. Visiting Attraction: 18% 3. Walking countryside: 11% 3.Other: 11% 4. Cycling: 2% Shopping: 0%; Food & Drink: 0%; Sports: 0% and Festival & Events: 0%

Overseas Staying Visitor Summary

Geographic Location

Whilst Australia, Europe and North America feature more strongly than other countries, with the low sample size any small variation in visitor sample would significantly change the emphasis completely. The spread of countries of origin and the low percentage of overseas visitors suggest that in terms of overseas visitors Shropshire is not a primary destination. The statistics suggest that Shropshire is likely to attract the more mature markets, or overseas visitors who have already visited the UK on several previous occasions or those who have a specific connection with the county.

A number of business respondents indicated that they don't specifically target the overseas market. Some indicated a very wide spread of nationalities which seems to be borne out in the main visitor survey.

Age Profile

69% of the overseas visitor survey were in the groups of 45+, compared to 85% of the business survey, with a fairly even split across the three age groups 45 to 54, 55 to 64 and 65+

Type of Group

Both the Visitor Survey and Business Survey identified couples as being the most important group for overseas visitors at 70% of the market, followed by family groups at around 20%.

Economic Profile

AB's were again the most important group in both surveys. C1's also featured. Interestingly DE's ranked higher than C2's in the visitor survey but at only 13%.

Main Activity

General sightseeing was by far the largest activity undertaken at 44%, with shopping and 'other' (inc. VFR) at 16% and 17% respectively. The business survey suggested visiting an attraction as well as sightseeing being the top activities. The visitor survey placed walking in the countryside at 11% the same as the business survey. Visiting an attraction was only 2%.

Business Survey Overseas Visitors

Main Activity

Other:
Christmas shopping and atmosphere (1 respondent)
Educational (1 respondent)
Visiting family (1 respondent)
Work (1 respondent)
Weddings, Funerals etc (1 respondent)
Heritage Sightseeing (1 respondent)

The business survey identified what respondents thought were the main motivation for overseas staying visitors to visit Shropshire Hills & Ludlow as follows:

Main Motivation

1. History Heritage: 39%
2. Visiting the Countryside: 21%
3. Rest & Relaxation: 18%
4. Other: 11%
5. Visiting the towns: 9%
6. Indulgence: 2%

Those who ticked 'other' said:
Educational (1 respondent)
Passing through (1 respondent)
Visiting family (1 respondent)
A mixture of all the above (1 respondent)
Work and sightseeing (1 respondent)
Personal visits - as above (1 respondent)

Business Survey Overseas Staying Visitors - Future Markets

Asked if there *'Is there a new or emerging overseas visitor market you intend to target in the future?'* Only 5 businesses responded and suggested:

Olympic visitors in 2012/ Olympic-related tourism (2 respondents)
South America (1 respondent)
Having recently visited Dartmoor and seen a great many EC visitors (presumably because of the strength of the Euro), I'm surprised we haven't had enquiries from there (1 respondent)

DATA SUMMARY: PRIMARY TARGET MARKETS

N.B. this table is based on *consumer* evidence from the visitor surveys.

	Day Visitors	UK Domestic Staying Visitors
Main Geographic location	1. Shropshire 2. 1 hour drive time	1. West Midlands 2. London & South East 3. North West
Main Age Group	45 plus	45 plus
Main Type of Group	Couples travelling without children	Couples travelling without children
Main Socio-Economic profile	ABC1	ABC1
Main Activity	1. General sightseeing 2. Walking countryside* 3. Shopping	1. General sightseeing 2. Walking countryside 3. Other
Suggested Motivations	1. Visiting the Countryside 2. Rest & Relaxation	1. Rest & Relaxation 2. Visiting the Countryside

*Shropshire Hills & Ludlow DDP wish to highlight that 36% of recipients (21 businesses) to the Business Survey undertaken by Shropshire Tourism in 2011 stated that they felt Walking countryside was the main activity undertaken by day visitors. This may indicate an increased interest in walking since the 2007 visitor surveys were undertaken.

Due to the size and spread of the overseas markets in the various visitor surveys, there is no recommendation being made at this stage for Shropshire Hills & Ludlow DDP to develop the overseas markets.

Shropshire Hills & Ludlow DDP also state that within some parts of the DDP area, and for some of the partner organisations undertaking marketing, other markets which may be 'secondary' for the destination as a whole, are also significant. The secondary markets identified in the Sustainable Tourism Strategy of: families, walkers (of a wide variety of kinds), young actives and learners, justify an amount of targeted marketing in these circumstances, which should be complementary to that aimed at primary target markets.

Motivational Research Summary

Research commissioned by the former Shropshire County Council and Shropshire Tourism in 2005 (updated in 2008) and conducted by Team Tourism, identified several key psychographic groups and segments that offered the best product and market fit for Shropshire. (These are referred to in 'A Strategy and Action Plan for Sustainable Tourism in the Shropshire Hills and Ludlow.')

Shropshire Hills & Ludlow DDP state that the research in the first half of this document shows that the visitor profile for the Shropshire Hills and Ludlow is not exactly the same as that for the whole of Shropshire, with a higher representation of interest in the countryside (main motivation for 43% of day visitors, 37% of UK staying visitors) and walking (main activity for 26-36% of day visitors, 24-30% of UK staying visitors).

((Note: Additional visitor perception and motivation research has been commissioned by Shropshire Council on behalf of the Marches Local Enterprise Partnership. Being conducted by Arkenford, the results of this research should be available after Christmas. It is recommended that this additional insight is incorporated into Shropshire Hills & Ludlow DDP decisions and any future marketing activities)).

Team specifically identified four core UK based groups as being suitable for Shropshire to develop and exploit further:-

- *'Traditionals'* - ABC1, 45% are aged 46 to 65 and 40% are retired. This more mature market, enjoy intellectual challenges, arts and culture, museums, churches, and historic sights. Enjoy experiences out of the ordinary, favour UK, enjoy short breaks and gardens.
- '*Discoverers'* – C1, mainly under 55, they are the most active day visitor market but are last minute deal takers and will consider short breaks in rural locations. They are higher spenders and enjoy a relaxed pace of life. They enjoy intellectual challenges but arts and culture are not an important part of their profile.
- *'Cosmopolitans'* - ABC1, age 42+, 38% post-family, high income, urban based, active like arts, culture, shopping. Enjoy intellectual challenge and discovery, value peace and relaxation.
- *'Sightseers and Potterers'* (Day Visitors) - ABC1 (C2s also important), 45 plus visiting as couples. Demographically broad in its characteristics this group would be looking for a day out to get away from it all, enjoying the street scene and independent shops and food offer.

With all these segments the majority of visitors will be travelling as couples. However a proportion will be travelling in groups, either as a club or society, or as part of a coach tour. The activities that they will be undertaking are likely to include cultural activities, walking and enjoying the countryside, pottering, shopping, eating out and general relaxation. Quality of experience in all aspects is essential for these types of visitor.

A more detailed description of these psychographic groups and segments are provided in the following tables.

Segment	Traditionals (Rest & relaxation)
Key dimensions	
The experiences to be offered to visitors	Relaxing break offering an authentic experience that is special, yet safe. The experience would include sightseeing (market towns, scenic drives etc) local food and drink, speciality shopping, arts and crafts, visiting attractions, museums and gardens, quality cultural events, gentle walking)
Markets and marketing	
Market focus (characteristics of target audience)	Traditionals represent 12.4% of the population. This market will tend to be from older age groups – typically they are aged 46-65. Most of this segment will be post family, and a significant proportion retired. They are predominantly ABC1. This market has reasonable disposable income. They are low users of internet, yet a high proportion (over 40%) do purchase goods using the web. They are the most active weekend break takers and show more interest in England than any other segment. In general, they are likely to undertake some physical exercise, enjoy arts and culture, gardening and listening to the radio. They enjoy visiting a broad range of attractions including churches and historic sites. A good night out involves classical music, theatre, arts or socialising with friends.
Marketing messages, and positioning	The key messages are of rest and relaxation, 'Be yourself,' authentic experience, and not following the crowd. For example, describe a short break experience: 'Stay in a fine country house or cosy B&B, enjoy a fine meals' or stroll along the banks of the River Teme, pick up some art or antiques, see gardens and castles... find some space to breathe, have some time for yourself.
Marketing activities	Specific marketing activities should include: • Radio advertising (Classic FM, Magic,) • Editorial features in Gardening magazines, weekend supplements (particularly the Telegraph and Mail) • Weekend features in local papers in North West, East Midlands, M40 corridor • Features in Caravanning magazines • Postcards for direct mail (using bought mailing lists) • Promotion of packages and reader offers to coach and tour operators including joint local press and radio advertising with operators

Segment	Discoverers (Rest and relaxation)
Key dimensions	
The experiences to be offered to visitors	The experience on offer is one of somewhere new and different to explore, with new experiences, 'surprises' but easily accessible for a short break or day trip. Specific activities will include sightseeing (particularly off the beaten track), local food and drink, walking, visiting museums and attractions, and speciality shopping. This market will be seeking special breaks using quality self-catering and more exclusive or distinctive hotels and are three times more likely to select a weekend in England than one abroad
Markets and marketing	
Market focus (characteristics of target audience)	Discoverers are independent thinkers. This group are quite high spenders, and value new products and services as well as new experiences. They also value good service. They live a relatively relaxed pace of life and enjoy intellectual challenges. This group are more likely than most to holiday off the beaten track and are also keen on last minute breaks and self-catering. This particular segment will be from ABC1 socio-economic groups. It is likely to be dominated by post family groups, although any campaign activity should not necessarily ignore families as a potentially emergent group. These are likely to be 'Caring Families' who place an emphasis on their children's development and education within their leisure experiences.
Marketing messages, and positioning	Key messages to this segment are of Shropshire as 'England undiscovered', the place you haven't visited yet, exclusive and authentic, off the traditional tourist trail, space to breathe.
Marketing activities	Specific marketing activities should include: • Press advertising in weekend supplements (Independent, Guardian) • Emailing to database of respondents interested in outdoors/quiet places • Media campaign including information provision for independent guidebooks, a proactive editorial programme including creating/selling-in news, features and pictures; advertorial deals including special supplements, readers' offers and competitions; broadcast-media programme sponsorships/product-placements; strategic display advertising, possibly including TV channels such as the History Channel and National Geographic • Database marketing of special offers

Segment	Cosmopolitans
Key dimensions	
The experiences to be offered to visitors	Cosmopolitans view themselves as stylish and individualistic (but not fashion followers) although they will happily adopt traditional values when they feel is appropriate. Cosmopolitans enjoy a wide range of activities including drinking and eating out, they appreciate theatre and entertainment and are more likely to visit museums and galleries than historic sites and gardens. On short breaks, although they like city breaks they also like scenic locations. Three out of four weekends will be taken in England rather than abroad.
Markets and marketing	
Market focus (characteristics of target audience)	Demographically this group makes up 15.2% of the population and are a predominantly young segment with over 40% aged under 35 however the mean age is 42. A quarter are pre family and some 38% post family. Typically visiting as couples they would be mainly from ABC1 socio economic groups (although C1s are the predominant segment). They are high technology users but still seek value and functionality They are risk takers and happy to try new things and experiences. Individuality is important as is individual attention and they are high spenders.
Marketing messages, and positioning	Try something different, away from the crowds, plenty to do and see, discover something new. Independent shops and catering offer will particularly appeal to this segment.
Marketing activities	• Develop web and social media platforms • User Generated Content websites • Database and CRM development with new and existing contacts, featuring tailored suggestions and itineraries and offers. • Targeted events and festivals (art/culture) • Independent retail, food, drink and dining offers • Positive editorial coverage in appropriate programmes and publications Countryfile, Country Tracks, food publications, Independent, Guardian, Lonely Planet Rough Guide etc

Segment	Sightseeing and Potterers (Day visitors)
Key dimensions	
The experiences to be offered to visitors	"A day away from it", "A change of scenery" discovering the surprises of Shropshire. Specific activities could include pottering around Ludlow's streets and discovering speciality shopping, eating out, may also include gentle country walking this will make use of the rural appeal outside of the town.
Markets and marketing	
Market focus (characteristics of target audience)	Demographically this group would be relatively broad in its characteristics. Typically visiting as couples and generally 45 plus. They would be mainly from ABC1 socio economic groups (although C2s would also be important).
Marketing messages, and positioning	Take a day to live the life you want to live, be who you want to be, expand your horizons, clear your mind
Marketing activities	• Editorial coverage through database of contacts with local TV, radio stations and newspapers in Birmingham, Stoke on Trent, Worcestershire, Manchester, Liverpool, Wales (both BBC and commercial stations). • Regularly supply press stories on events, special attractions, stories • Above the line advertising campaign featuring commercial radio stations and local and regional press • Database and CRM development with new and existing contacts, featuring forthcoming tailored events and day trip itineraries • Direct promotion via banner poster campaigns within the geographic locations

Secondary target markets

(Cited in 'A Strategy and Action Plan for Sustainable Tourism in the Shropshire Hills & Ludlow 2011-2016')

Domestic short breaks and holidays – Families

A limited market currently in the Shropshire Hills, but increasingly attractive to families with younger children who enjoy spending time together in the outdoors. Self-catering and camping holidays will be important, and eco-friendly accommodation will particularly appeal to some families taking lifestyle decisions which focus on wellbeing and the environment. The regional market with shorter travel times will be important here. Attracting families is important for growing future loyalty to the destination. Adherence to school holidays is a disadvantage strategically, but families can be attracted for short breaks out of season.

- **Niche markets**

Local specialist providers take much of the responsibility for targeting their own customers, but the destination can lend support to this activity through presentation of complementary images and messaging.

Dedicated walkers

This important niche market will enjoy several days in the Shropshire Hills, with walking in as the main purpose of their visit. They may follow a long distance route, walking from place to place, or take several long walks from one base. Not all will be loyal to the Shropshire Hills, taking similar walking holidays in other locations. Satisfied clients of local walking operators may well be tempted to return for a future holiday in the area.

Young active singles and groups of friends

This is a largely weekend market driven by enthusiasm for specialist activities such as mountain biking or airsports. Growing interest, especially amongst female friends, in riding breaks. Looking for sociable places to stay overnight, including group accommodation, camping and pubs.

Singles and couples looking for active learning experiences

This is a growing market of individuals looking for opportunities to learn new skills in the company of new people. Can also be attractive to couples wanting to spend time together doing something different, or learning something that they can use in future. Largely weekend but people will make time during the week for an opportunity that they can't get elsewhere. Interest in residential courses, but nearby accommodation also attractive to couples.

Although the above markets have been identified as the main targets with long term potential, this does not mean that other potential visitor markets should be ignored. In particular, the area should take advantage of the upcoming opportunity to seek exposure in overseas marketing linked to the promotion running into 2012 of Much Wenlock as the birthplace of the modern Olympics.

SECTION 2: THE PRODUCT & OFFER

The Shropshire Hills & Ludlow Product & Visitor Offer

The term 'visitor driver' is used to describe the product or offer (experience) that actually motivates or attracts visitors to visit an area. It is also usually the product or offer that visitors have a higher awareness of when compared to other products or offers that may be available to them within an area. This is however only part of the 'attraction' equation; each visitor market will have a particular set of personal 'needs' that they expect to be fulfilled by visiting an area.

These 'needs' could be seeking rest and relaxation, spending quality time with friends or family, experiencing a specific event, or even meeting a perceived idea of what visiting an area may give them such as long walks in the countryside, having a pub meal by a roaring fire, etc. These perceived ideas are equally important to attracting the visitor and the destination should aim to meet these perceived ideas as much as meeting the visitors' actual needs. The visitor's actual experiences while in the area will nevertheless be an important factor in determining whether they make return visits.

Activities visitors may undertake when visiting and how they spend their time will also vary. Research again shows visitors will participate in a broad range of activities and may well partake in a mix of activities. These could include; general sightseeing, walking and enjoying the countryside, shopping, eating and drinking, visiting attractions, attending events and so on.

Shropshire Hills & Ludlow has a diverse and distinct visitor offer to all its primary visitor markets. Previous consumer motivational and perception research shows that thecounty's main visitor driver in this area is Ludlow (coming after Shrewsbury and Ironbridge). This research ranked the Shropshire Hills as the fourth visitor driver for Shropshire. Shropshire Hills and Ludlow DDP point out that as a large countryside area lying between and close to the three most important towns for tourism, the Shropshire Hills provides a very complementary part of the county's tourism offer.

Shropshire Hills & Ludlow DDP also state that *"the area is currently quite fragmented but has great potential to pull together and match better known rural destinations elsewhere in England based on high quality, designated landscapes. A key is the unspoiled and accessible upland countryside combined with a number of small towns full of character and individuality. The approach should involve building awareness of the area as a whole while strengthening linkages between the constituent parts."*

"Evidence shows that recognition of the Shropshire Hills as a distinct destination is increasing, and this is supported by national work to raise the profile of AONBs (including through collective national branding), the area's application for the European Charter for Sustainable Tourism and links with the Wye Valley, Brecon Beacons and Clwydian Range, and a current strategic initiative by Defra to promote AONBs as a key part of rural

tourism. The profile of the Shropshire Hills should be raised at the county level as one of the 'jewels' of the county, and the area's links with Shrewsbury and Ironbridge as well as all the towns in the DDP area should be maximised."

Additional motivational products and offers are Shropshire Hills & Ludlow's countryside and rural ambiance, its other market towns, the high quality food and drink available in the area, festivals and events, the architecture, the range of shops and the area's history and heritage. In terms of what visitors are seeking they may well be motivated to a lesser or greater extent by a combination of some or indeed all of the above.

Shropshire Hills & Ludlow DDP point out that Church Stretton is particularly linked with the Shropshire Hills and has developed its own marketing strategy based on being the Heart of the Shropshire Hills and an important base for walking and outdoor activities. Bishop's Castle also identifies walkers as a key target market, and runs a well established annual Walking Festival. Ludlow Tourism Group have identified strengthening links with the Shropshire Hills countryside as a key priority in their promotion approach. Considerable work has been done on maximising the Olympic connection for Much Wenlock during 2012, and this should feature strongly in destination marketing during the next year.

The table overleaf shows how the main visitor drivers are under-pinned by supporting drivers and the overlap and the inter-relationships between the products available and the visitor offer or experience.

((Note: it was not part of this brief to write creative propositions or develop brand statements and so the suggested visitor offer/experiences have been put forward to encourage further discussion and provide a basis for developing the brand position and marketing communications))

Primary Drivers	The Products	The Visitor Offer (Experience)
LUDLOW **Support Drivers** Food & Drink Festivals & Events History & Heritage Shropshire Hills & the Rural Setting Other market towns and villages	Ludlow Festival Food Festival & Other Events Ludlow Castle Medieval Town/Street Scene St Laurence's Dinham Weir Independent Shopping Arts & Crafts Street Markets Ludlow Races	A chance to experience 'real' England' and connect with the past. An undemanding chance to rest, relax and recharge. A chance to buy and experience some good quality, honest, healthy, locally sourced food and drink. Experience something different, feel safe and secure.
SHROPSHIRE HILLS **Support Drivers** Walking opportunities Cycling, Riding & other Outdoor Activities Unspoilt Scenery & Views, Wildlife Market towns and villages, e.g. Church Stretton, Bishop's Castle, Much Wenlock, Cleobury Mortimer Close geographic links with mid-Wales, Ironbridge, Shrewsbury & Herefordshire	The nationally important landscape of the AONB, falling into four main areas: - The Long Mynd & The Stiperstones - The Wrekin & Wenlock Edge - Clee Hills & Corvedale - Clun Forest & Valley Cardingmill Valley Shropshire Way & Other Key Identified Routes Offa's Dyke & Hill Forts Walkers Are Welcome Towns Activity centres Onny Valley The Shropshire Hills Discovery Centre Places to eat Market Towns Shops & Markets	A chance to get away and experience and (safely) access the countryside A chance to get some fresh air, maybe some gentle exercise A chance to rest, relax and re-charge in unspoilt surroundings Experience something different, feel safe and secure

FOOD & DRINK **Support Drivers** Farms & Countryside Local food & drink Ludlow & Market towns	Pubs & Inns Farmers Markets Food Centres Restaurants & Cafes Food festivals Micro-breweries	A chance to buy and experience some good quality, honest, healthy, locally sourced food and drink. A chance to indulge and experience something real and genuine
HISTORY & HERITAGE **Support Drivers** Buildings & Places People, Connections & Culture Farming & Countryside	Ludlow Castle Stokesay Castle Stokesay Court Acton Scott Working Farm, Churches, Architecture Offa's Dyke & Hill Forts Events (Green Man, Arbour Day) Snailbeach Mines, The Bog Clun Castle, Hopton Castle Market Towns	A chance to experience 'real' England and connect with the past, get back to a quieter way of life A chance to rest, relax and re-charge without being bored or short of things to see and do Experience something different, feel safe and secure

Previous consumer research has identified how visitors perceive Shropshire in terms of a destination brand and it has also shown that much of Shropshire's brand values are reinforced by Shropshire Hills and Ludlow's product and visitor offer.

To ensure an effective visitor experience the destination has to deliver against the visitor brand expectations and to do this the offer has to be supported by physical infrastructure (car parks, toilets, signage, etc.) and by meeting the visitors physical requirements (accommodation, places to eat, things to do, etc). However it is also equally as important to appreciate that the destination must also deliver against the visitor's perceived ideas about the destination.

Marketing - as distinct from selling - is essentially about creating a demand for a product in the mind of a consumer that 'buying' a product will fulfil the consumer's needs, wants, desires and expectations.

Having identified the primary target visitor markets and those drivers and products that attract them, successful visitor marketing communications should clearly convey to the target markets 'why and how' a visit to Shropshire Hills & Ludlow will actually fulfil their particular needs or wants, whether as a day visitor or overnight staying visitor. This is the 'offer' or experience.

Addressing the 'why and how' is not about presenting a 'shopping list' of products but by demonstrating a clear match between what the visitors are seeking or expecting to get from a visit to a destination and convincing them that the destination will actually deliver this for them. Communications need to be engaging with the visitor markets and connect on a personal and emotional level.

Successful destination marketing will get the visitor's attention, create an interest in the visitor's mind to visit by demonstrating this match, engage with the target audience, create a personal resonance and instigate the visitors to respond to a call to action.

Research has repeatedly identified that visitor awareness of the Shropshire Hills and indeed Shropshire as a whole is low. Visitors will select particular destinations based on a range of factors and visitors will simply <u>not</u> select a destination unless they are aware of it – (it would be like you buying a product you have never heard of).

Furthermore, potential visitors will not choose to visit one destination over another unless they know something about what it has to offer them and what they will personally get out of their visit. So in developing a marketing action plan shifting this low consumer awareness of the destination is essential and must remain as a key priority if the visitor markets are to grow.

To respond to the market based on the fact that Ludlow is the third most important driver for Shropshire (and the primary driver for 'South Shropshire') we recommend leading with 'your best foot forward'. In practical terms this means that all marketing communications should refer to 'Ludlow and the Shropshire Hills' rather than the other way round.

Research also shows that the Shropshire Hills are the second most important driver for 'South Shropshire' and the fourth most important for Shropshire.

Shropshire Hills & Ludlow DDP state that, *"The DDP has the function to 'develop the destination' and further work to strengthen and encourage use of the Shropshire Hills brand can only be of benefit."*

In an ever crowded and competitive market place, differentiation from other similar destinations is essential. Where products may appear even superficially to be very similar, differentiation can be achieved through the development of a distinctive style and tone for all of Shropshire Hills and Ludlow's marketing communications. This is not about a 'strap-line' or slogan but an integrated, planned and defined communication style that runs through all marketing vehicles and media and applies equally to both words and images.

The main marketing objective for developing the visitor markets in Shropshire Hills & Ludlow are to increase the economic and social contribution that tourism can bring to the area, within the context of the overall sustainable tourism approach. This can be achieved by growing market share of the primary visitor markets, attracting new visitor segments and increasing visitor spend and dwell time in the area.

In seeking to develop the identified target visitor markets for Shropshire Hills & Ludlow, it is recommended that the suggested marketing strategy should have three distinct priority marketing objectives:-

i). Raising Awareness of Shropshire Hills & Ludlow as a visitor destination worthy of consideration by the target markets.

ii). Presenting Shropshire Hills & Ludlow drivers, product and themes underpinned by the unspoilt rurality of the area as a compelling visitor 'offer' (experience) to these target markets, using a distinctive style and tone in all communications.

iii). Providing potential visitors with easy and clear routes to find further information about Shropshire Hills & Ludlow and ultimately 'purchase' the product.

It is recommended that the suggested marketing action plan should seek to deliver against these three priority marketing objectives.

The following marketing action plan identifies a range of possible marketing activities for consideration by the Destination Development Partnership and gives an indication of their recommended priority ranking in terms of importance. Their ultimate deliverability will be wholly dependent on the actual marketing resources available and should more resources become available then priority actions can be proportionally increased by volume and value i.e. more advertising, more brochure distribution, etc. or additional new activity can be conducted.

As previously stated, there is additional perception and motivational research currently being conducted by Arkenford, commissioned by Shropshire Council on behalf of the Marches Local Enterprise Partnership. The results of this latest research are due to be available after Christmas. It is therefore recommended that this should be fed into the development of the marketing messages and creative content as well as the final marketing action plan.

SECTION 3: THE MARKETING PLAN & RECOMMENDATIONS

3.1 Strengthen and clarify the Brand for the Shropshire Hills & Ludlow

Destination marketing is more successful when all partners, private and public, are using the same messaging, tone and style. One means of creating a more consistent approach is to have clear and defined brand guidelines that all marketing activity works to – whether that be a brochure, website or simple press release or flier.

Shropshire Hills & Ludlow should be more than simply about tourism and should cover the wider economic and social wellbeing of the area. A brand 'bible' can also be used to influence inward investment messaging, attracting new residents and covering the much broader range of 'place marketing' which includes all economic and social communications.

To influence and guide existing marketing activity and any future new marketing, a clear and consistent approach is necessary, and this is a key co-ordinating role for the DDP. The Sustainable Tourism Strategy and Action Plan identified as the first two actions to agree core destination values and messages and agree and disseminate a visual identity and text. The DDP has already progressed work on these actions. They state that the values and messages which the DDP has identified and supported should underpin all marketing activity for the area by all organisations who do it. These values and messages are:

Values

Tourism promotion for the Shropshire Hills and Ludlow should convey:

- An authentic experience of a stunning landscape and exceptional historic towns,
- A reputed centre for local food and drink and environmentally conscious businesses.

Messages

- This is a diverse area, based on its uniquely varied geology, with wild hills and gentle valleys.
- A range of different market towns all have their own character, and there are many pretty villages. Ludlow has a national reputation as a market town of outstanding character and for its food.
- There are fantastic views, tranquillity and dark skies, along with excellent opportunities for walking to suit all abilities, and for both challenging and relaxing activities.
- The area is unspoilt due to its 'off the beaten track' location on the English-Welsh border, but is nevertheless relatively accessible to many parts of England (and Wales), and well linked to transport networks, including public transport.
- There is a great richness of wildlife (particularly from the mix and transitions of upland and lowland) and of heritage and historic features (especially hillforts, Offa's

Dyke, castles associated with the border location, mining relics and a great variety of traditional buildings).

Discussions within the DDP have revealed more difference of opinion regarding visual identity and text. There is agreement that the existing brand should be strengthened rather than defining something new. In a number of discussions the group has so far collectively supported sticking with the 'Ludlow and the Shropshire Hills' title for destination level material (i.e. the main destination brochure and website produced by Shropshire Hills Tourism).

However, Shropshire Hills & Ludlow DDP feel *"it is important to note that every discussion reveals a lack of consensus on this, and a feeling that the Shropshire Hills identity is gaining rapidly in recognition, supported by alignment of activity by a range of partners and a higher profile nationally for AONBs. The prominence given to Ludlow may need to be reviewed in the future. Given that the northern fringes of the DDP area are over 25 miles from Ludlow, and some of the other market towns are quite distant, the title is also not felt to work particularly well for the whole area. The diversity of the area is recognised as a real strength, and the way the brand is used at a more local level might be different, e.g. Church Stretton, Bishop's Castle and other towns can link to the brand of the Shropshire Hills without giving prominence to Ludlow.*

The Sustainable Tourism Strategy recommends developing a visual identity reflecting and building upon the current corporate identity of the Shropshire Hills AONB. There is interest in developing a new derivation of the AONB logo for the destination, aiming to keep the well established 3 bumps, but to appear 'softer' than the very crisp, modern, and rather corporate AONB logo, to reflect better the more traditional and rustic appeal of the area to visitors. This could be done by some texture in the artwork, more natural colours and a less formal font. The 'Area of Outstanding Natural Beauty' line could be omitted, and the option of adding '& Ludlow' or '& ANother town' underneath could provide a flexible but consistent approach.

When brand guidelines are more established and agrees, the DDP may be able to develop a slimmed down freely available version of the Shropshire Hills 'Sense of Place Toolkit', giving businesses sample text about the area, along with information and guidance about how to refer to it in a more consistent way. If done under the name of the DDP, this would also be a good way of raising awareness among businesses of the DDP itself, and providing some tangible benefit to them from it."

3.2 Promotion (Off Line)

Day Visitor Guides

The current day visitor guide (the Shropshire Hills & Severn Valley Discovery Leaflet) was produced jointly by Shropshire Hills Tourism and Bridgnorth Tourism Association with funding support from Shropshire Council and with a print run of 100,000 it had an anticipated 2 year shelf life.

An annual Shropshire Hills Events & Visitor Guide is also jointly produced by several DDP partners with a circulation of 30,000 and around 200 events listed. Various town guides and leaflets also exist. Although the focus of most of these leaflets is information more than marketing, Shropshire Hills & Ludlow DDP wish to state that these leaflets are significant in terms of raising awareness and building sense of place and brand identity.

In order to continue to reach the 'Traditional' and 'Sightseers/Potterers' segments printed publications are still required. The day visitor markets for Shropshire Hills and Ludlow still use print and brochures as a source of information therefore it is suggested that consideration be given to producing another day visitor guide with a similar print run to the Shropshire Hills & Severn Valley Discovery Leaflet but it should be supported with a comprehensive and targeted regional distribution plan.

However, it is recommended that the day visitor guide should be developed to offer more of a destination 'sell' to potential day visitor markets rather than the information bias in the previous guide. Further consideration could be given to incorporating QR (Quick Recognition) codes as these may provide greater interpretation opportunities.

There may well also be advertising opportunities that could generate additional income for this production.

Staying Visitor Guide

The main staying visitor guide is an A4 publication with a print run of 25,000, produced by Shropshire Hills Tourism and funded through advertising revenues. The main distribution is via the Visitor Information Centres in response to direct visitor enquiries and it is also distributed via other key outlets.

The staying visitor markets still use traditional brochures and visitor guides both as a source of information on an area but also as a key part of their decision making processes (the 'Traditionals' segment is the largest user of printed brochures). It is suggested that in order to grow the domestic staying visitor market the visitor guide is continued with but it is recommended that the print run and distribution plan is re-visited and use of the guide for visitors already in Shropshire Hills & Ludlow are limited. Enhanced distribution could be achieved by use of a spring and autumn response campaign targeting potential new visitors that match the core staying markets from within the identified target geographic areas.

Promotional Literature

The staying markets, 'Discoverers' and 'Cosmopolitans' respond to themed offers and packages, although there is limited supporting promotional literature available in Shropshire Hills & Ludlow on what visitors can do and see when here. The past successful use of Town Trails, Food and Drink Trails, etc could be developed further into a series of targeted leaflets to promote the different aspects of Shropshire Hills & Ludlow's visitor offer to help promote the area and it's offer and add value to the visitor experience, prolong visitor stay and encourage movement around the area.

Shropshire Hills & Ludlow DDP also highlight that the AONB Partnership produces a range of promotional literature about projects and initiatives in the area, including the Shropshire Hills Sustainable Business Scheme which identifies to customers businesses which have made a commitment to sustainability, and the Friends of the Shropshire Hills AONB. Given the importance of local markets and day visitors, these opportunities for people to find out about and link with the Shropshire Hills area are significant for raising awareness. Other organisations such as the National Trust and the Shropshire Wildlife Trust also have substantial memberships in the relevant target markets and literature, events and education activities of these organisations locally provide ways in for people to visit the area, often repeatedly.

Creative Development & Support

The key to ensuring that printed brochures and leaflets and indeed any advertisements are successful is the messaging contained within them. The consistent use of a style and tone, supporting images and quality of production has to convey not only Shropshire Hills & Ludlow's visitor offer but also be distinctive in the market place and resonate with the target audiences. It is recommended that further resources be applied to developing the 'emerging' distinctive style for Shropshire Hills & Ludlow and that this quality creative input is brought into all marketing activities.

Awareness Raising Advertisements

In the past Shropshire Tourism has used successful awareness raising adverts in several national papers and media. Success in this type of advert is measured by positive shifts in either the perception individuals have, or by narrowing the 'brand gap' between what individuals think and the reality of the destination.

It is recommended in light of the low awareness levels of what Shropshire Hills & Ludlow can offer possible visitors, resource is put towards a concerted awareness raising campaign and it is entirely focussed on increasing the profile of Ludlow and the Shropshire Hills as a potential place to visit amongst the target audience. Shropshire Hills & Ludlow DDP state that adverts targeted at the walking press have also been successful. Since the Shropshire Hills are recognised as the prime walking destination within Shropshire, the 'Shropshire Hills' brand should be given prominence in county level walking promotion.

Billboards and Posters

There are three suggested strands to an outdoor advertising campaign; a local approach, a regional approach and a national approach. The local posters and billboards could reach a large number of passing vehicles on key routes passing the main market towns or using the main A49. They would also help raise awareness of the area's distinctive offer and can also be used to promote events and help attract day visitors from the immediate surrounding area.

Used effectively at a regional level it could offer a chance to tap into the potential day visitor markets and be used to promote specific events and help shift awareness of Shropshire Hills & Ludlow.

At a national level the staying market is the key focus group and these could raise awareness and extend Shropshire Hills & Ludlow's reach within the prime geographic areas.

Coach Tour Packs/Itineraries

As the population ages and with increased costs of travel, there has been a notable trend towards increased coach travel amongst the ABC1 markets that traditionally avoid coach travel. This higher spend visitor offers an attractive market for further development for key parts of the Shropshire Hills and Ludlow and the other market towns linked into specific events, themes or offers such as Ludlow festival, food and drink, street markets, heritage days, etc.

It is recommended that resource is applied to developing this market further in partnership with the private sector and Shropshire Tourism, and that a group travel pack and specific itineraries are also developed that can attract the upper end of the coach market.

Travel Trade Promotions & Shows

Consideration should be given to attending or partnering at key travel trade shows to help grow the travel trade markets and promoting the food and drink offer and rural offer by attending food shows and outdoor activity shows. However we would recommend that each possible show is subject to a detailed cost benefit analysis as returns can sometimes be mixed.

3.3 Promotion (Online)

Destination Website Development

As internet usage amongst the target markets grows the main destination website www.visitshropshirehills.co.uk will increase in importance and become over time the main marketing platform. Currently provided by Shropshire Hills Tourism and hosted by Shropshire Tourism, there has been additional investment made into this website over the past few years which has seen the visitor offer become more diverse and inclusive. In order to sustain the website accommodation and attractions entries pay to go on the website, events are provided free entry, and some retail and catering business are also currently featured free of charge.

The content has significantly improved and navigation has been made clearer and simpler for the visitor to use. Attracting only some 35,000 unique visits per annum this website provides both information and the destination sell.

It is recommended that consideration should be given to making greater use of Ludlow as the primary driver for this part of Shropshire in both use of domain and content, though the integration of the Shropshire Hills as a key component of the county's offer and its links with the top drivers of Shrewsbury and Ironbridge should also be maximised.

All the identified psychographic segments use the internet to a lesser or greater extent; It is therefore recommended that further investment is made in the site to make the visitor offer more engaging and to better sell the destination. Development of featured businesses and strong recommendations would strengthen the website – use of ‘the best place to’: eat, shop, relax, discover, etc or what to do in 2 hours in Shropshire Hills & Ludlow would help the visitor better understand what the area has and what they could imagine themselves doing when visiting.

Consideration should also be given to making the site more transactional with booking systems, download vouchers and accommodation booking systems. Using featured businesses would make the offer genuine and these featured businesses could make a contribution towards the websites operating costs. Social interaction is covered further later in the recommendations.

Database Development

There are existing databases of past brochure requests, enquiries made to the visitor information centres and other existing databases at other outlets such as the Assembly Rooms, Museums, Shropshire Hills Discovery Centre and other places. It is recommended that a new centralised database is developed for Shropshire Hills & Ludlow and that Shropshire Council act as data stewards on behalf of the Destination Development Partnership. With more specific field usage this could provide a means of up-selling and cross-selling that is not being exploited at the moment.

Past database contacts should be cleaned and filtered and mailed to via the current data holders to encourage them to sign up to the new destination database. Incentives can be used to encourage uptake.

E:Newsletters & Offers

Based on the profile of Cosmopolitans and on the back of the database, it is recommended that use of regular newsletters and selected and targeted offers via a branded destination template is also considered. Consideration should also be given to bought in lists of profiled contacts to add to the database and increase reach.

Social Media Management

Whilst recent research from Conrad Advertising (Nov 2011) suggests that only 8% of Facebook users and only 5% of Twitter users will use these social platforms in planning a holiday, some 50% of Trip Advisor users will use this platform as part of their planning process. Interestingly 35% will use reviews on the destination website.

It is recommended that resource is applied to developing and actively managing Trip Advisor reviews and content and that consideration is given to developing a ‘review section’ on the existing destination website.

Shropshire Hills & Ludlow DDP state that Shropshire Hills Tourism should consider developing both a Facebook and Twitter account for the destination, but the amount of time and resource allocated to this activity should be proportional to its likely benefit. In absence of this, the established social media activity by the AONB Partnership (nearly 1,300 followers/likes), the Council’s tourism officer (over 900 followers) and others including many individual businesses, should be optimised by the adoption of relevant messages. Consideration should also be given to developing Flickr content and using blogs and forums as a means of increasing consumer engagement.

YouTube

The use of destination images on YouTube with direct links to and from the main destination website is an affordable way of promoting the destination, raising its profile and showcasing the best it has to offer. There are also no bandwidth implications or download issues when using YouTube. Encouraging visitors to share their footage will also add to both content and engagement.

Video Images online

Hosting video directly on the main website would allow Shropshire Hills & Ludlow more control of the brand and messaging. We would recommend limiting content to the primary drivers and stories only and to remain aware of the bandwidth and data drawdown requirements of this approach.

Viral Campaigns

One established methodology to extend market reach is the use of creative and clever virals and incentivised offers. To be effective viral campaigns rely on being passed on within 'social' groups and so generally the content has to be either valued or entertaining. Successful virals tend to push the boundaries in terms of content as a conventional advert may not be shared, whereas one that tests or challenges taste, decency or humour is more likely to be shared.

Creative Development & Support

In order to ensure both brand consistency and improve messaging it is recommended that resource is allocated towards creative development.

3.4 Direct Response Activity

Response Adverts & Fulfilment

Whilst much of what has been proposed has been about raising awareness and engagement, the primary objective of any marketing strategy is to produce measurable and tangible growth in the market place. In order to continue to reach the 'Traditionals' it is recommended that consideration is given to regular spring and autumn response campaigns to generate new staying visitors coming to Shropshire Hills & Ludlow.

Mailers

In the past successful postcard campaigns and direct mail have also generated measurable visitor enquiries and numbers. Targeted to the 'Traditionals' it is recommended that these should be used as a means of increasing staying visitor numbers but they should be highly targeted and contain worthwhile offers and incentives to ensure return on investment rates.

Integrated Offers

The highly successful Marylebone Railway and Hotel offer run by Shrewsbury Tourism Association proved that there is both consumer demand and uptake of packaged offers for the short break markets. 'Cosmopolitans', 'Discoverers' and 'Traditionals' all respond to this type of bespoke offer.

It is therefore recommended that this type of integrated or packaged offer should be developed for Shropshire Hills & Ludlow and extended to include other partners and products. Consideration could also be given to widening the offer to include other destination drivers such as Shrewsbury and Ironbridge.

Creative Development

As has been previously mentioned, the quality of all communications needs to be improved and consistent with the destination brand. It is recommended that resource is made available for creative content.

3.5 Press & PR

Press PR Campaign

The Shropshire Hills and Ludlow has been the beneficiary of significant and positive press and PR, as has Shropshire. This is an effective and affordable means of raising awareness and reaching specific target markets. It is recommended that consideration is given to retaining a press PR agent with contacts in the mainstream media (not just travel trade as this has limited market reach) and consideration is also given to allocating resource to an in-house point of contact to develop the media profile of the area.

Hosting Journalists

As part of a DMP funded initiative Shropshire Tourism successfully used a press hosting budget to attract and host visiting journalists. This activity generated significant press coverage. It is recommended that a budget is made available to specifically target journalists whose publications and programmes match the primary target markets.

Media Packs

Media packs can be used to give journalists the information they need on the destination; these can be supported by mini CDs. It is suggested that new destination media packs are developed with loose leaf contents to enable a more professional PR approach and to support the destination press contact.

3.6 General Marketing Support Tools

Photography

The current image library does not adequately portray the market towns, the rural area and its visitor offer. New images are urgently required to support print, websites and press activity that shows real visitors in real places, mindful of the target markets Shropshire Hills

& Ludlow is seeking to attract. Images should be of the highest quality and creativity and wholly complement the brand guidelines and inspire and resonate with the target markets.

Video Clips
Consideration should be given to commissioning short video clips (2 to 3 minutes each maximum) that show the destination and its offer in the most positive light and that represent the target market and what they may experience on a visit. These can be used on You Tube in press work or direct on line.

CDs/USBs
Video films, static images, print can all be transferred onto CDs and USB sticks. These can be used to support other marketing and PR activity.

Shropshire Hills & Ludlow Merchandise
Merchandising is a simple means of promotion and conveying messages as well as possible income generation. Highly creative unique merchandise that differentiates the destination could not only be lucrative but also get the destination message out far and wide. The copy and content used on merchandise should be brand and message compliant.

Creative Development & Support
As has been previously mentioned the quality, style tone and messaging of all communications needs to be improved and consistent with the destination brand. It is recommended that resource is made available for creative content.

Ambassadors Development/Training
With limited personnel on the ground and time pressures on those that are there it is suggested that the development of an ambassadors programme may supplement the current position and allow for more individuals to be available to host familiarisation visits, engage with visitors within the destination and support some of the activities being undertaken by existing organisations within the area.

SECTION 4: MARKETING PRIORITY SUGGESTIONS:-

Recommended actions are summarised in the tables below. Shropshire & Ludlow DDP has taken into account the range of organisations involved, and the current role of the DDP more as a co-ordinator than having budgets and delivering directly.

Abbreviations for organisations:

AONB	Shropshire Hills AONB Partnership
DDP	Shropshire Hills & Ludlow Destination Development Partnership
SC	Shropshire Council
SHT	Shropshire Hills Tourism
ST	Shropshire Tourism

Cost ranges are based on those in the Sustainable Tourism Strategy Action Plan – low being up to c£15,000 per year in total for the activity.

Extracts from 'A Strategy and Action Plan for Sustainable Tourism in the Shropshire Hills and Ludlow', p65:'Implementing the Action Plan', section 1: Raising Awareness:

	Action	Priority	Year	FI*	Partners
1.1	Agree core destination values and messages	*	1	Low	DDP, AONB, SHT
1.2	Agree and disseminate a visual identity and supporting text		1-2	Med	DDP, AONB, SHT

*FI: Financial Implications

Marketing Activity	Priority	Year	Lead & partners	Cost range
General Marketing support tools: Develop brand guidelines for Shropshire Hills & Ludlow	1	1	DDP, AONB, SHT	Low
Apply brand guidelines to Off Line & online marketing activity	1	1-3	DDP, SHT, AONB, Area/ town tourism groups	Low
Apply brand guidelines to Direct Response Activity	2	2-3	SHT, businesses	Low

Extract from 'Implementing the Action Plan' section 1 (p65) Raising Awareness:

	Action	Priority	Year	FI	Partners
1.3	Assemble a good photo collection		2-3	Med	DDP, AONB, SC, ST

Marketing Activity	Priority	Year	Lead & partners	Cost range
General Marketing Support Tools: Improve shared pool of high quality photographs conveying brand values	1	1,2	SC, DDP, AONB, SHT	Low

Extracts from 'Implementing the Action Plan' section 1 (p65) Raising Awareness:

		Priority	Year	FI	Partners
1.4	Establish and maintain a high profile destination website	*	1-5	Med	DDP, AONB, SHT, ST
1.5	Develop and implement an online marketing strategy		1-5	Low	DDP, SHT, ST

Marketing Activity	Priority	Year	Lead & partners	Cost range
Promotion (Online)				
Maintain and develop principal Destination Website www.visitshropshirehills	1	1-3	SHT	Low
Develop databases for direct marketing, (integrating with VICs)	1	2-3	SC, SHT, businesses	Low
Consider development of E:Newsletters/Offers	1	2,3	SHT	Low
Actively Manage existing Social Media channels and consider new feeds specifically for the destination (inc. Trip Advisor, Facebook, Twitter etc)	1	1-3	AONB, SC, SHT	Low (but significant time commitment)
Develop YouTube presence	2	2-3	SHT	Low-med
Add Video images to on line activity	2	2-3	SHT	Low
Viral Campaigns/E:offers	3	2-3	SHT	low

Extract from 'Implementing the Action Plan' section 1 (p65) Raising Awareness

		Priority	Year	FI	Partners
1.6	Maintain a suite of key destination print		1-5	Med	DDP, AONB SHT, ST,

Marketing Activity	Priority	Year	Lead & partners	Cost range
Promotion (Off Line)				
Continue/ renew printed Day Visitor Guide	1	1-3	SHT, AONB	Low
Continue printed Staying Visitor Guide	1	1-3	SHT, AONB	Med
Continue and improve promotional literature (e.g town guides, postcards, mailers)	2	1-3	AONB, area/ town tourism groups	Med (in total but individual publications low)
Develop Coach Tour Packs/Itineraries	2	2-3	Area groups, businesses, AONB	low

Extract from 'Implementing the Action Plan' section 1 (p65) Raising Awareness

		Priority	Year	FI	Partners
1.7	Pursue an active PR campaign	*	1-5	Med	DDP, AONB, SHT, SC, ST, VE

Marketing Activity	Priority	Year	Lead & partners	Cost range
Press & PR				
Increase Press Pr Campaigns, including targeted markets such as walkers	1	1-3	SC, SHT, Area groups, AONB	Low-med (collectively)
Hosting Journalists	1	1-3	SC, SHT, Area groups, AONB	Low
Develop Destination Press Packs	2	2-3	DDP	low

Extracts from 'Implementing the Action Plan' section 1 (p65) Raising Awareness

		Priority	Year	FI	Partners
1.8	Establish and maintain a presence in Shropshire promotions		1-5	Med	DDP, ST, SC
1.9	Pursue opportunities in selected target markets		2-5	Med	DDP, AONB, SHT, ST, VE

Marketing Activity	Priority	Year	Lead & partners	Cost range
Promotion (Off Line)				
Awareness Advertisements	1	2-3	SHT	med
Billboards/Posters (Local, Regional, National)	3	2-3	SHT	med
Coach Tour Packs/Itineraries	2	2-3	DDP, SHT, AONB	low
Travel Trade Promotions & Shows	2	2-3	SC, SHT	Low (but time commitment)
Direct Response Activity	**Priority**	**Year**	**Lead & partners**	**Cost range**
Media Buying Response Adverts	1	1-3	SHT	Med
Fulfilment (envelopes, postage, time)	1	1-3	SHT	Med
Integrated Offers	2	2-3	Businesses	Low – med
Direct Mailings	2	2-3	SHT	Low, but time commitment

Other Recommendations

General Marketing Support Tools	Priority	Year	Lead & partners	Cost range
Video Clips	2	2-3	Businesses, DDP	Low-med
CDs/USBs	3	2-3	DDP	low-med
Shropshire Hills & Ludlow Merchandise (development)	3	2-3	SHT, AONB	low-med
Creative Development & Support	3	1-3	DDP. SHT, AONB	low-med
Ambassadors Development/Training	3	1-3	DDP, SHT, AONB	low, but time commitment

Annex 1: Data Analysis and Business Survey Notes

Collated Visitor Surveys

- **Visitor Survey Percentages**

Most of the visitor surveys reports either include the main response only or, where appropriate, multiple responses therefore the percentages in each section may either not add up to 100% where main responses only have been displayed or in other cases with multiple responses they may well exceed 100%

- **Age Profile**

Age profile percentages have been applied to day, staying and overseas visitors for comparative purposes, e.g. where a survey states that 23% of all visitors are aged 45-54 we have applied this to 23% of day visitors, 23% of staying visitors and 23% of overseas visitors.

- **Type of Group**

For comparative purposes groups have been interpreted as follows:
Adult groups and adult couples are grouped together and classed as 'in couples'.
Solo adult are classed as 'singles'
Adults with children are classed as 'family group'

- **Calculation of overseas visitors**

We have assumed that the percentage of overseas visitors are included within the figures stated for staying visitors and day visitors on holiday and have assumed a 50/50 split in the absence of clarification and for ease of analysis.

Only 5% (9 interviewees) of visitors to Church Stretton were from overseas, therefore no analysis is available for this segment within the Church Stretton Destination Benchmarking Survey.

- **Touring visitors**

Where figures are available for day touring visitors these have been included in the overall day visitor samples.

General Notes

All numbers and percentages have been rounded to the nearest whole figure so figures may not equal 100%.

Business Survey

Due to the nature of the business survey being undertaken which included responses and views from several non tourism businesses and other organisations the individual results for each section have been presented as a percentage of those who responded only to the questions and not the entire business sample.

As with the visitor survey percentages have been rounded so may not add to 100% or where multiple answers have been received may add to over 100%.

Annex 2: Business Survey Questionnaire

Shropshire Tourism has been commissioned by Shropshire Council to prepare a marketing strategy for the Ludlow & Shropshire Hills Destination Development Partnership (DDP). As part of the proposed consultation processes, Shropshire Tourism is undertaking a survey to identify and establish which visitor markets you consider are the most important for your business and your area.

The survey results we obtain from you will be used in conjunction with the vast amount of consumer data and profile information we already have. So your response will not be taken in isolation.

The survey is going out to around 500 businesses in Ludlow and the surrounding area and will ultimately go to around 2,000 businesses throughout Shropshire and will cover a diverse range of tourism and visitor related businesses.

In asking the questions, we are trying to establish your main or primary market only. We fully appreciate you will have a broad range of customers who use your business and there will be a mix of age groups, coming from a wide geographic area and with multiple interests. They will also undertake a variety of activities when they are here in Shropshire (as has been borne out by previous visitor surveys). However at this stage we are asking you to identify only the top market for your business and select the most representative answer only.

By overlaying the results with all the other returns we get and by applying all the previous visitor survey data and market research we have, your answers will provide an added focus which is essential to help us develop an accurate marketing plan and ultimately identify the top four or five markets within each sector for us to target in the future.

We appreciate the challenge that this survey presents so please do feel free to contact me or any of the team at Shropshire Tourism if you need any assistance at this stage.

Thank you for participating.

Kind Regards,

Simon

Simon McCloy, MTMI MTS MIH MCIM.
Chief Executive
Shropshire Tourism (UK) Ltd

Primary Visitor Markets Analysis Survey

About Your Business:

Location: [ ] Postcode: [ ]

Accommodation:

- ☐ Hotel
- ☐ B&B
- ☐ Self catering
- ☐ Caravan Camping

Attraction:

- ☐ Historic Site
- ☐ Heritage property/castle stately home
- ☐ Museum
- ☐ Countryside Site
- ☐ Religious Site
- ☐ Farm Attraction
- ☐ Entertainment Venue
- ☐ Activity Provider (please specify below)

Retail:

- ☐ Clothes Fashion
- ☐ Jewellery
- ☐ Arts & Crafts Gallery
- ☐ Antiques
- ☐ Gifts Souvenirs
- ☐ General Goods
- ☐ Other (please specify below)

Catering:

- ☐ Food & Drink
- ☐ Pub Inn
- ☐ Restaurant
- ☐ Café
- ☐ Other (please specify below)

Main Visitor Markets
Day Visitors

Geographic Location:

- ☐ Within Shropshire
- ☐ ½ Hour Drive Time
- ☐ 1 Hour Drive Time
- ☐ 1 ½ Hour Drive Time
- ☐ 2 Hour Drive Time
- ☐ Longer

Age Profile (Main Visitors)

- ☐ Under 25
- ☐ 26 – 30
- ☐ 31 – 35
- ☐ 36 – 45
- ☐ 46 – 50
- ☐ 51 -55
- ☐ 56 – 60
- ☐ 61 – 65
- ☐ 65+

Type of Group:

- ☐ As Singles
- ☐ In Couples
- ☐ Family Group
- ☐ Educational
- ☐ Social Group (WI, Hen/Stag/Company/Membership - please specify below)

Economic Profile:

- ☐ Professional, managerial, affluent pensioners
- ☐ Supervisory, junior managment
- ☐ Worker/employed, self-employed
- ☐ Unemployed, students, state pensioners

Primary Activity Being Undertaken:

- ☐ Shopping
- ☐ Food & Drink
- ☐ Visiting Attraction
- ☐ General Sightseeing
- ☐ Walking Countryside
- ☐ Cycling
- ☐ Sports
- ☐ Festival & Events
- ☐ Other (please specify below)

Main Motivation:

- ☐ Rest & Relaxation
- ☐ Indulgence
- ☐ History Heritage
- ☐ Visiting the Countryside
- ☐ Visiting the Towns
- ☐ Other (please specify below)

Staying Visitors (UK Domestic)

Geographic Location:

- ☐ West Midlands
- ☐ South West
- ☐ North East
- ☐ Northern Ireland
- ☐ East Midlands
- ☐ London & South East
- ☐ North West
- ☐ Scotland
- ☐ Wales

Age Profile (Main Visitors)

- ☐ Under 25
- ☐ 26 – 30
- ☐ 31 – 35
- ☐ 36 – 45
- ☐ 46 – 50
- ☐ 51 -55
- ☐ 56 – 60
- ☐ 61 – 65
- ☐ 65+

Type of Group:

- ☐ As Singles
- ☐ In Couples
- ☐ Family Group
- ☐ Educational
- ☐ Social Group (WI, Hen/Stag/Company/Membership - please specify below)

Economic Profile:

- ☐ Professional, managerial, affluent pensioners
- ☐ Supervisory, junior managment
- ☐ Worker/employed, self-employed
- ☐ Unemployed, students, state pensioners

Primary Activity Being Undertaken:

- ☐ Shopping
- ☐ Food & Drink
- ☐ Visiting Attraction
- ☐ General Sightseeing
- ☐ Walking Countryside
- ☐ Cycling
- ☐ Sports
- ☐ Festival & Events
- ☐ Other (please specify below)

Main Motivation:

- ☐ Rest & Relaxation
- ☐ Indulgence
- ☐ History Heritage
- ☐ Visiting the Countryside
- ☐ Visiting the Towns
- ☐ Other (please specify below)

Staying Visitors (Overseas)

Geographic Location:

- ☐ Northern Europe
- ☐ Scandinavia
- ☐ North America
- ☐ Australia
- ☐ New Zealand
- ☐ India
- ☐ China
- ☐ Japan
- ☐ South America
- ☐ Southern Europe
- ☐ Southern Africa
- ☐ Northern Africa
- ☐ Other (please specify below)

Age Profile (Main Visitors)

- ☐ Under 25
- ☐ 26 – 30
- ☐ 31 – 35
- ☐ 36 – 45
- ☐ 46 – 50
- ☐ 51 -55
- ☐ 56 – 60
- ☐ 61 – 65
- ☐ 65+

Type of Group:

- ☐ As Singles
- ☐ In Couples
- ☐ Family Group
- ☐ Educational
- ☐ Social Group (WI, Hen/Stag/Company/Membership - please specify below)

Economic Profile:

- ☐ Professional, managerial, affluent pensioners
- ☐ Supervisory, junior managment
- ☐ Worker/employed, self-employed
- ☐ Unemployed, students, state pensioners

Primary Activity Being Undertaken:

- ☐ Shopping
- ☐ Food & Drink
- ☐ Visiting Attraction
- ☐ General Sightseeing
- ☐ Walking Countryside
- ☐ Cycling
- ☐ Sports
- ☐ Festival & Events
- ☐ Other (please specify below)

Main Motivation:

- ☐ Rest & Relaxation
- ☐ Indulgence
- ☐ History Heritage
- ☐ Visiting the Countryside
- ☐ Visiting the Towns
- ☐ Other (please specify below)