Overview report

North Shropshire & Oswestry DDP Marketing Strategy
Shropshire Hills & Ludlow DDP Marketing Strategy
Shrewsbury DDP Marketing Strategy

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EXECUTIVE SUMMARY

Shropshire Tourism has been commissioned by Shropshire Council to develop a marketing strategy and action plan for three of the four DDP areas in Shropshire, namely: North Shropshire & Oswestry, Shropshire Hills & Ludlow and Shrewsbury. These documents have now been completed and circulated to each DDP.

The aim of this overview document is to bring the findings of these strategies together and show how they integrate with one other.

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

Shropshire Tourism has also provided an overview of Shropshire'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.

Each DDP strategy seeks to increase the economic and social contribution that tourism can bring to their area by growing market share of the primary visitor markets, attracting new visitor segments and increasing both visitor spend and dwell time. These are the same priorities for Shropshire as a whole. Shropshire is recommended to focus its marketing efforts specifically 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 the area.

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 the North West, West Midlands and London and the South East.

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

i). Raising Awareness of Shropshire as a visitor destination worthy of consideration by these target markets

ii). Presenting the drivers, products and themes 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 and ultimately 'purchase' the product

The action plan in section 3 identifies a range of possible marketing activities for consideration 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, e.g. more advertising, more brochure distribution, or additional new activity can be conducted.

SECTION 1: VISITOR RESEARCH & DATA ANALYSIS

As part of developing each DDP marketing strategy and action plan, 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 for each particular area.

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:

North Shropshire & Oswestry

- North Shropshire District Visitor Survey 2007
- Oswestry Borough District Survey 2007
- Whitchurch Destination Benchmarking Survey 2007
- Oswestry Destination Benchmarking Survey 2007
- Wem Destination Benchmarking Survey 2007
- Market Drayton Benchmarking Survey 2007

Shropshire Hills & Ludlow

- South Shropshire District Visitor Survey 2007
- Church Stretton Destination Benchmarking Survey 2007
- Ludlow Destination Benchmarking Survey 2007
- Bishop's Castle Destination Benchmarking Survey 2007
- Shropshire Hills Area of Outstanding Natural Beauty Visitor Survey 2007

Shrewsbury

- Shrewsbury District Visitor Survey 2007

Collated Visitor Surveys

This report also incorporates the data for the Bridgnorth District Visitor Survey (2007) and the Shropshire Visitor Survey (2007), bringing together the results for all 14 surveys together, to identify the top priority market segments within the day visitor, UK domestic staying visitor and overseas visitor markets for Shropshire as a whole.

Drawing all the visitor survey data together gave a total survey sample of approximately 17,981 visitors. This is broken down as follows:

- Day visitors: 75%
- Staying visitors: 21%
- Overseas visitors: 4%

MAIN VISITOR MARKETS

The research identified the following key Day and UK Domestic Staying visitor markets for Shropshire to focus its marketing efforts on:

	Day Visitors	UK Domestic Staying Visitors
Main Geographic location	1. within Shropshire 2. 1 hour drive time 3. 1.5 hr drive time	1. North West 2. West Midlands 3. London & South East
Main Age Group	45 plus	45 plus
Main Type of Group	Couples travelling without children	Couples travelling without children
Main Socio-Economic Group	ABC1	ABC1
Main Activity	1. General sightseeing 2. Visiting an Attraction 3. Shopping	1. General sightseeing 2. Other* 3. Visiting an Attraction/Walking & Countryside

*Other: Predominantly visiting friends and relations

Due to the size (at 4%) and spread of the overseas markets in the various visitor surveys, there is no recommendation being made at this stage for Shropshire to invest in the overseas markets.

Please see Appendix 1 (p22) for the detailed breakdown of survey data.

PERCEPTION & MOTIVATION RESEARCH

Previous visitor perception and motivation research commissioned (in 2004 and revised in 2007) by the former Shrewsbury & Atcham Borough Council and conducted by Team Tourism using the Arkenford market segmentation approach identified several key motivational groups that offered a suitable market and 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; groups of couples, an extended family group, 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, pottering, shopping, eating out and general relaxation. Quality of experience in all aspects is essential for these types of visitor.

Shropshire Hills & Ludlow DDP also states that within some parts of their DDP area, other markets which may be 'secondary' for the destination as a whole, are also important to them. The secondary markets identified in the Sustainable Tourism Strategy for Shropshire Hills & Ludlow (2011-2016) are: families, walkers (of a wide variety of kinds), young actives and learners.

Gentle walks as opposed to long distance routes *do* appeal to Shropshire's target markets (as the summary below for the Marches LEP Research demonstrates); however, the average visitor walks less than 3 miles during their stay (Source: Shropshire County Council Visitor Survey 2007).

With limited funds available Shropshire Tourism therefore recommends that as a county, Shropshire concentrates on targeting its primary markets (see table on previous page), i.e. those that will deliver the best return on investment.

Of course if additional funding is available Shropshire Tourism would support marketing to these secondary target markets. This should be complementary to that aimed at primary target markets at all times.

Marches LEP Research: Summary of Key Findings

This visitor perception and motivation research was commissioned by Shropshire Council on behalf of the Marches Local Enterprise Partnership in 2011/12 (again, conducted by Arkenford). This is a survey of 'general public' samples (500 people in total) drawn from a 90 minute drive time and core overnight areas rather than a survey of Shropshire's specific primary target markets. However, it is nonetheless recommended that this additional insight is taken into account and incorporated into any future marketing activities.

Awareness & Consideration

- 84% would consider Shropshire for a holiday/short break/day trip
- 16% said Shropshire was 'my kind of place for a holiday/short break/day trip'

(There is a small difference in consideration and appeal of Shropshire when comparing the 'local' and 'non-local' findings)

Destination Appeal

- The segments that are more likely to perceive Shropshire as 'My Type of Place' are Cosmopolitans and Traditionals
  - Cosmopolitans are generally keen to try new experiences / see new places and are generally very positive
  - Traditionals are more risk averse, prefer more rural holidays, relaxation and history and heritage
- All of the Marches destinations also appeal to Functionals
  - Functionals are a group who are fiercely independent and budget orientated
- Ironbridge also appeals to Discoverers
  - This group like to learn and seek an experience that educates them

Period of Holiday

- Shropshire is considered to be a destination suitable all year round
- Shropshire is seen more as a place they would visit during an off peak period as opposed to peak period

First 3 things that come to mind about Shropshire

(1st, 2nd and 3rd spontaneous mentions in relation to Shropshire)

1st mention
1. Countryside/scenery (28%)
2. Nothing (10%)
3. Shrewsbury (10%)

2nd mention
1. Countryside/scenery (29%)
2. Shrewsbury (7%)
3. Nothing (6%)

3rd mention
1. Countryside/Scenery (19%)
2. Nice/picturesque/beautiful/interesting (8%)
3. Quiet/peaceful/relaxing (8%)

Shropshire Associations

- The strongest Shropshire association is the market towns/ villages/ scenic countryside and landscapes (79%)
- Shropshire is the least associated with cultural exhibitions, events and festivals and shopping (56% and 42% respectively)

Shropshire Activities

- Visiting local towns / villages / countryside, scenic areas and landscapes is the most appealing activity when on holiday

Types of Outdoor Activities People Enjoy
More gentle activities are enjoyed by a wider range of people…

- River walks (92%) forest trails (89%) and gentle strolls (87%) are the most appealing outdoor activities
- Hill walking/rambling (72%)
- Watching wildlife (67%)
- River cruising/boating (58%)
- Cycle trails (46%) and mountain biking (33%)
- Dog walking (45%)
- Extreme sports appeal to far fewer consumers (28%)
- Golf (22%) & Angling (25%) have least appeal

Types of Food & Drink
Top 'likes'

- Traditional pubs (85%) and tea rooms (76%) are amongst the most popular food and drink offer
- Tasting/ buying locally sourced produce is also increasingly popular (77%) as well as interest in farmers markets (73%) and farm shops (70%)

Types of History & Heritage

- AONB's were rated extremely highly (91%) closely followed by historic towns (90%) as 'My type of thing'
- Ancient monuments & sites (87%)
- Castles (86%)
- Historic Houses (84%)
- World Heritage Sites (83%)
- Gardens (75%)
- Museums (78%)
- Industrial heritage sites (72%)
- Guided history tours (58%)
- Cathedrals and Churches (77%)

Types of Place to Visit when Exploring

- Outdoor space is as popular as towns and villages when it comes to enjoyment of exploration
- Viewpoints, rivers, canals and waterways, and national parks all have great appeal
- Cathedral cities have more appeal than larger cities, but market towns and villages have the greatest appeal

Types of Shopping

- Towns with quirky / unique / independent retailers are enjoyed most (89%)
- Consumers also have a passion for markets, both specialist and more general (81% and 80% respectively)
- Preference for high street offer (well known stores/brands) over more up-market boutiques

Destination Perceptions

- The collective area (Shropshire, Herefordshire & Telford & Wrekin) is seen:
  - As a place to explore the surrounding area
  - Is Safe
  - Offers lots to do
  - Has a range of quality accommodation
  - A year round destination
- The region is not see as expensive or particularly touristy

Destinations Consideration

- Top 3 “My type of place” for a visit (in Shropshire):
  - Shrewsbury (52%)
  - Shropshire Hills (51%)
  - Ludlow (45%)

Others: North Shropshire (31%), Much Wenlock (28%), Bridgnorth (28%), Oswestry (27%), Bishop’s Castle (26%), Church Stretton (24%), Craven Arms (19%), Clun (15%), Cleobury Mortimer (15%)

Attractions Consideration

- ‘My type of places for a visit’ in Shropshire:
  - Ironbridge (65%)
  - Severn Valley Railway (56%)
  - Offa’s Dyke (48%)
  - RAF Museum Cosford (42%)

Ironbridge and Severn Valley Railway are within the top 3 places that are considered to be “My type of place” across Shropshire, Herefordshire and Telford & Wrekin.

Accommodation most likely to choose

- Most are likely to choose an independent hotel (3-5 stars) or B&B / guest house if staying in the area
- Self catering option is as popular as budget chain
- 1 in 5 will look for a camping option

Accommodation – Factors Influence Choice

The factors with the strongest influence on the choice of accommodation are:

- Word of mouth / previous experience
- Accommodation website or brochure
- Late rooms / special offers

Information Gathering Before Trip

- Internet search (92%) and recommendations/ word of mouth (63%) are the most popular ways people look for information about things to do in a specific area
- Consumers are as likely to look at holiday booking sites as they are an official tourist site
- Consumers are more likely to get information from an accommodation website than they are a destination brochure but 37% still use brochures
- Increasingly people search for information on mobile devices

Information Gathering During Trip

- Leaflets from tourist information centres and hotels are used most as a source of information during the trip (95%)
- Consumers are as likely to visit tourist board website (40%) during trip. Around a quarter look for information from their mobile

Implications of this research

As previously stated, this additional insight should be taken into account and incorporated into future marketing activities. For example, in practical terms marketing messages could include reference to the following products that will 'tick boxes' for the visitor:

Shrewsbury DDP:

- The town's location within the loop of the River Severn, e.g. 'stroll alongside the River Severn…'
- Quirky and unique independent shopping
- Historic buildings in a countryside setting

Shropshire Hills & Ludlow DDP:

- Walks alongside the River Teme and Onny within the AONB
- Lead with river walks, forest trails and gentle strolls rather than longer, more challenging routes
- Market towns and independent shops
- History and heritage, castles and historic sites in a countryside setting

North Shropshire & Oswestry DDP:

- Stroll alongside the Meres and canals in North Shropshire & Oswestry
- Market towns and independent shops
- History and heritage, castles and historic sites in a countryside setting

The insight into how people gather information before and during their trip is also useful and is referred to in Section 3 of this report when discussing the marketing mix.

SECTION 2: THE PRODUCT & VISITOR OFFER

The term 'visitor driver' is used to describe that 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. 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 taking long walks in the countryside, having a pub meal by a roaring fire, ambling around the shops or taking in the sights etc. These perceived ideas are equally important to the visitor as any physical need and the destination should meet the perceived ideas as much as meeting the visitors' actual needs.

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, shopping, eating and drinking, walking around, visiting attractions, attending events and so on.

Shropshire has a diverse and distinct visitor offer which will appeal to all of its primary visitor markets.

SHROPSHIRE'S PRIMARY DRIVERS

The 3 individual DDP strategies identify the primary drivers for each particular area. Consumer motivational and perception research shows that Shrewsbury is the main visitor driver for Shropshire and most first time staying visitors to the county will gravitate towards Shrewsbury on their first visit. Ironbridge is the 2nd primary driver, followed by Ludlow and the Shropshire Hills. Each DDP should recognise that it is necessary for the county to lead with its 'best foot forward', e.g.

Shopping: Shrewsbury and Shropshire's market towns
History & Heritage: Ironbridge
Scenery & Countryside: Shropshire Hills
Food: Ludlow
Canals & Gardens: North Shropshire & Oswestry

However, it is also important to maximise cross-selling opportunities with other areas of Shropshire. For example, Shrewsbury is an integral part of the Shropshire visitor offer and the Shropshire visitor offer is an integral part of Shrewsbury's visitor offer.

The following table brings the products for the 3 DDP areas together and identifies the primary product offers for Shropshire as a whole, with supporting drivers:

Primary Drivers	Supported By	The Visitor Offer (Experience)
Market towns Shrewsbury Ludlow	Independent retail shops (primarily Shrewsbury) Major retail brand outlets Shropshire's other market towns Other primary drivers	Find quirky independent shops and big brand names in historic market towns. Experience high quality independent shops and old fashioned service – without stretching your bank balance. Take a stroll along the river, take in the sights or relax in a café, tearoom or country pub. Experience something different, in safe, secure and unspoilt towns.
Landscapes & Countryside Shropshire Hills/AONB Rivers & Canals Meres and mosses in North Shropshire	Market towns and villages Diverse attractions, e.g. gardens History & Heritage Food & drink, local produce & farm shops	A chance to get away, experience and (safely) access the countryside. Get some fresh air, maybe some gentle exercise – river walks, forest trails, etc. A chance to rest, relax and re-charge in unspoilt surroundings.
Food & Drink Ludlow Local Produce & Farm Shops Traditional pubs and tea rooms	Farms & Countryside Other Market towns Farmers markets Food & Drink Festivals	Buy and experience good quality, honest, healthy, locally sourced food and drink. Visit a food fair or farmers market and take a taste of Shropshire home with you.
History & Heritage Ironbridge Shrewsbury World Heritage Sites	Castles and forts Historic Houses Museums Other market towns Llanymynech Heritage area (North Shropshire) Myths & Legends, e.g. King Arthur (North Shropshire)	A chance to experience 'real' England and connect with the past; get back to a quieter way of life.

Although Bridgnorth & Much Wenlock fall within the new DDP area for Ironbridge & The Severn Valley and a strategy for this particular area has not yet been commissioned, it is also important not to overlook this area in marketing communications for the county. Much Wenlock as the Birthplace of the Modern Olympic Games is a strong message and Shropshire should continue to capitalise on the connection and on the importance of Bridgnorth as one of Shropshire's market towns serving the West Midlands.

SECTION3: THE MARKETING PLAN & RECOMMENDATIONS

Each DDP strategy seeks to increase the economic and social contribution that tourism can bring to their area by growing market share of the primary visitor markets, attracting new visitor segments and increasing both visitor spend and dwell time.

These are the same priorities for Shropshire as a whole.

Shropshire is recommended to focus its marketing efforts specifically 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 the area.

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 the North West, West Midlands and London and the South East.

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

i). Raising Awareness of Shropshire as a visitor destination worthy of consideration by these target markets

ii). Presenting the drivers, products and themes 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 and ultimately 'purchase' the product

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

In developing the marketing plan the recommendations reflect the most appropriate and balanced mix of routes or methods to reach the identified target markets.

'Traditionals' are generally low internet users and so will rely on conventional print and media. They do buy on line and so need access to an informative website that offers a degree of transaction. They listen to Classic FM radio and selected arts and culture programmes, read specialist interest magazines and quality main stream papers. They are also responsive to packages and reader offers via both coach and tour operators.

'Discoverers' are the most active internet users and will purchase on line so require an effective website with a higher level of transactional ability. They play computer games, read and listen to (live and recorded) music.

'Cosmopolitans' are also high internet users but more for information rather than purchase. They have varied tastes and this will be reflected in their choice of media and reading. They are the most impulsive group and most likely to respond well to last minutes offers and deals as well as themed breaks.

'Sightseers and Potterers' (Day Visitors) are the broadest group in terms of their characteristics. They will listen to local and commercial radio and read local and regional papers.

The marketing action plan identifies a range of possible marketing activities for consideration 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.

3.1 Promotion (Off Line)

Day Visitor Guide

The main day visitor guide for Shropshire is produced by Shropshire Tourism. In 2012 the Shropshire & Welsh Borders 'Places to Visit' brochure is being replaced by the new 'Shropshire Days Out' publication. This is a new day visitor guide with a print run of 100,000 copies and targeted distribution to Shropshire and regional Visitor Information Centres, major attractions and hotels in key target areas.

Bearing in mind the Marches LEP research and the increasing number of people who look for information on mobile devices, this guide is also supported by unique QR (Quick Response) codes with interactive links direct to www.shropshiredaysout.co.uk and links to advertisers own websites. The guide is A2 folded to DL in size with a large map for visitors to orientate themselves during their visit to the county.

Staying Visitor Guide

The main staying visitor guide is an A4 landscape publication with a print run of 30,000, also produced by Shropshire Tourism and funded through advertising revenues. The guide is supported by a targeted distribution campaign to key target areas and is also supported by a spring direct response media campaign.

The 'Traditionals' segment is the largest user of printed brochures and in order to grow the domestic staying visitor market, it is recommended that the print run and distribution plan is re-visited and that an Autumn response campaign is also considered to run for the next three years 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 only a limited supporting promotional literature available in Shropshire on what visitors can do and see when here, none of it packaged.

The success of the Darwin Trail in Shrewsbury demonstrates the usefulness and need for a series of targeted leaflets to promote the different aspects of Shropshire's visitor offer – e.g. Food & Drink, History & Heritage, etc – this type of print will complement individual leaflets for each DDP area but will also add to the visitor experience and appreciation of the towns and countryside. Importantly, they will also lead with the key drivers for each 'theme' within the county as a whole and help to drive visitor footfall to areas of the county with potential spend opportunities.

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's offer but also be distinctive in the market place and resonate with the target audiences.

Awareness Raising Advertisements

In the past successful awareness raising adverts have been placed 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. These adverts should be entirely focussed on increasing the profile of Shropshire as a potential place to visit amongst the target audience.

It is recommended that resource is put towards a concerted awareness raising campaign, in light of the low awareness levels of what Shropshire can offer possible visitors within all the identified segments.

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 the by-pass and encourage them to stop and visit the town. They would also help raise awareness of Shropshire's distinctive offer and can also be used to help attract day visitors from the immediate surrounding area.

Used effectively at a regional level it could offer a chance to tap into consumers already using existing and more established retail competitors.

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

TV/Radio

Past awareness raising campaigns from Shropshire Tourism and featuring Shrewsbury have been held via Classic FM and shown to have raised brand awareness by 9%. This campaign ran in 2002 and cost £50,000 and a further £10,000 to undertake the brand gap measurement. Previous TV campaigns promoting Shrewsbury's retail offer have also been reported as being successful.

It is recommended that both Radio and TV should remain as options to consider in the future. However, the limited budgets indicated in the brief suggest that in terms of generating direct visitor numbers (both day and staying) other marketing activities may prove to be more rewarding and offer more attractive returns on investment.

Coach Tour Packs/Itineraries

The 'Traditionals' are responsive to coach and tour operator offers, additionally as cost of private travel increases and the population ages, there has been a trend towards high end coach travel amongst the AB markets.

There is a strong opportunity to develop the coach markets for both day and staying visitors for Shropshire and it is an area that Shropshire Tourism wishes to develop further.

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. These can also be added as downloads to www.shropshireforgroups.co.uk

Travel Trade Promotions

To better exploit the tour operator opportunities, consideration should be given to attending or partnering at key travel trade shows to help grow the travel trade markets. However we would recommend that each possible show is subject to a detailed cost benefit analysis as returns can sometimes be mixed.

3.2 Promotion (Online)

Destination Website Development

The main destination website www.shropshiretourism.co.uk is provided by Shropshire Tourism. In order to sustain the website, accommodation and attractions entries pay to feature (as part of their Shropshire Tourism membership fee) and events are provided free entries. This website receives over 600,000 unique visitors per annum and provides both information and the destination sell.

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' would help the visitor better understand what Shropshire has and what they could imagine themselves doing when visiting.

Consideration should also be given to making the site more transactional as the main market segments for Shropshire increasingly purchase online. Online availability and booking *is* an option for businesses on the website but only a few businesses buy into this. The benefits of online availability and booking should therefore be communicated to them and the process for updating their availability should be simplified to improve the experience.

This website is also supported by other niche websites managed by Shropshire Tourism, e.g. www.shropshireshopping.co.uk, www.shropshirefoodanddrink.co.uk, www.shropshirewedding.co.uk, www.shropshireconferences.co.uk and www.shrophiregolf.com

Database Development

Shropshire Tourism manages a database of past brochure requests (direct requests to www.shropshiretourism.co.uk, visitors who have telephoned the office or requests generated as part of a media campaign).

This database is not integrated with Shrewsbury, North Shropshire & Oswestry or Ludlow and the Shropshire Hills; VIC's in these 3 DDP areas manage their own brochure requests. It is recommended that data from these three DDP areas is 'fed' to Shropshire Tourism, who could act as data stewards for all areas. 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 Shropshire 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 visitor reviews on the destination website.

All main staying markets will use review sites as part of their selection processes so 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.

Whilst Shropshire does have both a Facebook and Twitter account the amount of time and resource allocated to this activity is proportional to its likely benefit, i.e. limited. If budgets allow, 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. Current Shropshire Tourism videos include 'The Sounds of Shropshire' (as featured on Classic FM and the Shropshire Tourism website).

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 is unlikely to be shared, whereas one that tests or challenges taste, decency or humour is more likely to be shared. This is likely to be most effective amongst ‘Cosmopolitans’ and ‘Discoverers’ particularly, and the younger age groups.

Creative Development & Support

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

3.3 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.

Mailers

In the past, successful post card 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 Shrewsbury’s 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 further and extended to include other partners and products in Shropshire, e.g. 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.

3.4 Press & PR

Press PR Campaign

Shropshire Tourism has an enviable a track record in generating positive press and PR. This is an effective and affordable means of raising awareness and reaching specific target markets. Currently, several commercial Press & PR agencies also operate within the county.

Hosting Journalists

As part of the Darwin celebrations a press hosting budget was allocated 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 for Shropshire.

Media Packs

Again as part of the Darwin celebrations, media packs were developed to help promote Shrewsbury and give journalists the information they needed on the destination. These were supported by mini CDs. It is suggested that new destination media packs with loose leaf contents could be produced to enable a more professional PR approach and to support the destination press contact.

3.5 General Marketing Support Tools

Create the Brand 'bible' for Shropshire

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 is a brochure, website or simple press release or flier.

It is recommended that a budget allocation is made towards developing the branding for Shropshire and that quality creative input is brought into all marketing activities. It is anticipated that the work currently being undertaken by 'WeAllNeedWords' for Shrewsbury DDP may also be useful in influencing Shropshire wide marketing messaging.

Photography

The current image library does not adequately portray Shropshire 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 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 online.

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 Merchandise

During the Darwin celebrations merchandising was looked at as a 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 Shropshire 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, meet and greet coaches, engage with visitors within the destination and support some of the activities being undertaken by existing organisations within the county.

SECTION 4: MARKETING PRIORITY SUGGESTIONS:-

Marketing Activity	Priority one	Priority Two	Priority Three
Promotion (Off Line)			
Day Visitor Guide	1		
Staying Visitor Guide	1		
Promotional Literature (postcards, mailers)		2	
Creative Development & Support	1		
Awareness Advertisements	1		
Billboards/Posters (Local, Regional, National)			3
Coach Tour Packs/Itineraries		2	
Travel Trade Promotions & Shows			3
Promotion (On Line)			
Destination Website Development	1		
Database Development (integration with VICs)		2	
E:Newsletters/Offers		2	
Actively Manage Social Media (inc. Trip Advisor, Facebook, Twitter etc)			3
Develop YouTube presence		2	
Add Video images to online activity		2	
Viral Campaigns/E:offers			3
Creative Development & Support	1		
Direct Response Activity			
Media Buying Response Adverts	1		
Fulfilment	1		
Integrated Offers		2	
Direct Mailings		2	
Creative Development & Support		2	
Press & PR			
Press PR Campaign	1		
Hosting Journalists	1		
Destination Press Packs		2	
General Marketing Support Tools			
Create the Brand ‘bible’ for Shropshire	1		
Photography	1		
Video Clips		2	
CDs/USBs			3
Shropshire Merchandise (development)			3
Creative Development & Support			3
Ambassadors Development/Training			3

APPENDIX 1

Shropshire Visitor Analysis

	Day Visitors	Staying Visitors	Overseas Visitors
Total Sample size: 17,981	Total sample size: 13,531	Total sample size: 3,734	Total sample size:716
Geographic Location	1. within Shropshire: 30% 2. 1 hour drive time: 20% 3. 1.5 hr drive time: 15% 4. 30min drive time: 10% 5. Longer: 3% 6. 2 hour drive time: 2%	1. North West: 14% 2. West Midlands: 13% 3. London & South East: 10% South West: 1% North East: 1% East Midlands: 1% Wales: 1% Shropshire: 1%	1. Northern Europe: 25% 2. North America: 22% 2. Australia: 22% 3. Other: 10% 4. New Zealand: 6% 5. Southern Europe: 4% 6. Southern Africa: 1%
Age Profile	1. 55-64 years: 19% 1. 65+ years: 19% 2. 45-54 years: 18% 3. 35-44 years: 16% 4. 0-15 years: 16% 5. 25-34 years: 8% 6. 16-24 years: 4%	1. 55-64 years: 23% 2. 65+ years: 19% 3. 45-54 years: 18% 4. 35-44 years: 15% 5. 0-15 years: 12% 6. 25-34 years: 8% 7. 16-24 years: 4%	1. 45-54 years: 24% 2. 55-64 years: 21% 3. 65+ years: 18% 4. 35-44 years: 17% 5. 0-15 years: 9% 6. 25-34 years: 6% 7. 16-24 years: 5%
Type of Group	1. In couples: 53% 2. Family Group: 36% 3. As singles: 9% 4. Social Group: 1%	1. In couples: 59% 2. Family groups: 32% 3. As singles: 8% 4. Social Group: 1%	1. In couples: 56% 2. Family groups: 31% 3. As singles: 12% 4. Social Group: 1%
Economic Profile	1. C1: 34% 2. AB: 30% 3. C2: 22% 4. DE: 15%	1. AB: 38% 2. C1: 36% 3. C2: 16% 4. DE: 9%	1. AB: 51% 2. C1: 30% 3. DE: 11% 4. C2: 9%
Main Activity	1. General sightseeing: 26% 2. Visiting Attraction: 23% 3. Shopping: 18% 4. Other: 12% 5. Walking countryside: 11% 6. Festival & Events: 6% 7. Food & Drink: 3%	1. General sightseeing: 26% 2. Other: 24% 3. Visiting an Attraction: 12% 4. Walking/Countryside: 12% 5. Canal trips: 10% 6. Shopping: 8% 7. Festival & Events: 4% 8. Food & Drink: 3% 9. Cycling: 1%	1. General sightseeing: 44% 2. Other: 15% 3. Shopping: 10% 4. Walking/Countryside: 9% 5. Visiting an Attraction: 8% 6. Canals: 7% 7. Festival & Events: 3% 8. Food & Drink: 2%

APPENDIX 2

<u>Survey Notes: Collated Visitor Surveys</u>

Visitor Survey Percentages
Most of the visitor survey reports either include the main response only or, where appropriate, multiple responses. Visitors are often presented in the surveys as being from the 'Top Six' locations. 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

Calculation of overseas visitors
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'

Touring visitors
Where figures are available for day touring visitors these have been included in the overall day visitor samples. This will increase the 'drive time' assessment for day visitors.

<u>General Notes</u>
All numbers and percentages have been rounded to the nearest whole figure so figures may not equal 100%.

<u>Definitions</u>
AB: Professional, managerial, affluent pensioners
C1: Supervisory, junior management
C2: Worker/employees, self-employed
DE: Unemployed, students, state pensioners
VFR: Visiting Friends and relatives