

# THE MARCHES LEP VISITOR ECONOMY STRATEGY



*This strategy has been developed by Blue Sail Consulting Ltd working with Marches LEP, Herefordshire Council, Shropshire Council and Telford & Wrekin Council.*

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# 1 ABOUT THIS STRATEGY

This is a visitor economy strategy for the Marches - the counties of Shropshire and Herefordshire, and the unitary authority of Telford & Wrekin. It has been commissioned by The Marches Local Enterprise Partnership (LEP) to understand the potential of the visitor economy. The strategy sets out what needs to be done to deliver the economic opportunity in a way that supports the environment and fulfils the role of tourism as an enabling sector.

## THE BIG PICTURE

Tourism is one of the UK's largest and fastest growing industries. England makes up over 80% of the UK's total visitor economy, generating £106 billion a year, employing over 2 million people and supporting thousands of businesses<sup>1</sup>. In the last decade, tourism growth has outperformed the construction, manufacturing and services sectors<sup>2</sup>. It's a resilient sector that performs well in times of economic growth and in recession.

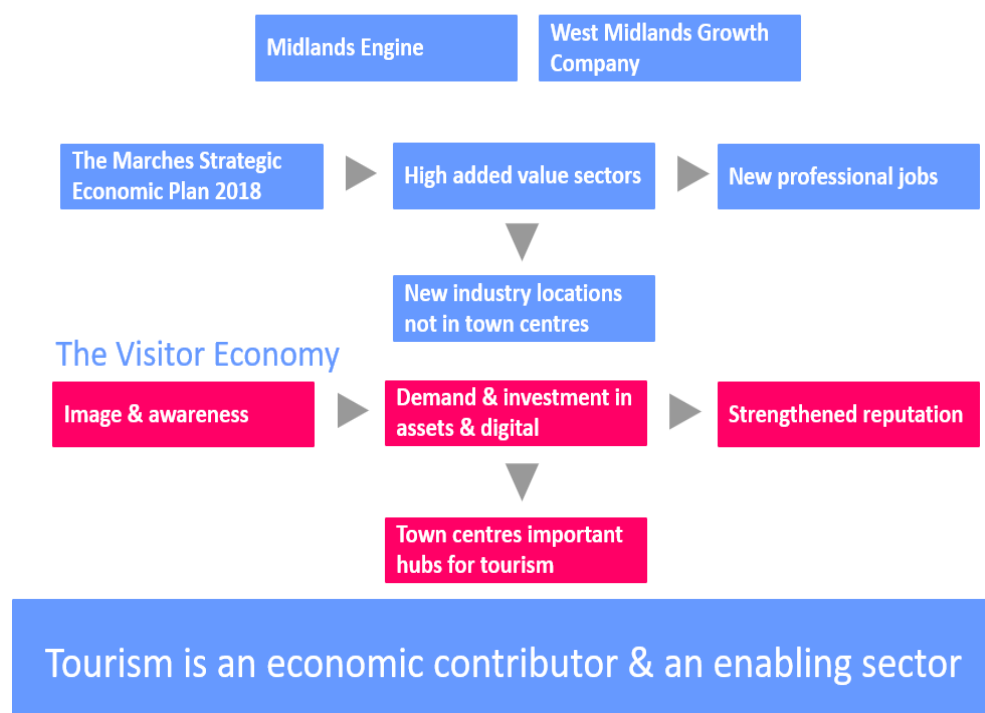
The visitor economy generates spend and creates jobs. The nature of the sector means it can quickly create opportunities for local people, from skilled employment to entry level jobs. The tourism sector is made up primarily of small and micro-businesses some of which need support and guidance to achieve their business potential. Individually these businesses cannot present the destination effectively in the marketplace, nor is it their role. There is a need for destination leadership. Experiences elsewhere shows this is most successful when led by the public sector working in collaboration with the industry.

*The Marches Strategic Economic Plan 2019* prioritises inward investment in a small number of high added value sectors. These sectors play to the strengths of Herefordshire, Shropshire & Telford, will deliver new jobs and attract new people to live and work in the area. Investors want to be confident that the Marches is a place where their current and future workers will enjoy living, attracted by scenic living, local culture, and the communities and facilities that can be found in the towns and villages. That's where the visitor economy comes in.

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<sup>1</sup> Visit Britain/VisitEngland

<sup>2</sup> Tourism Alliance 2018



*This diagram shows how the visitor economy can support the investment in new sectors across The Marches and generate economic benefit, support vibrant town centres and raise the profile of The Marches as a place to live, work and visit.*

Visitors contribute to creating vibrant places to live and work through their spend at cultural venues, festivals, shops and places to eat. Visitors enjoy the public spaces in towns and get out into the countryside. Through their use, visitors help to make the case for investment in cycleways, footpaths and public transport, culture and digital infrastructure. Visitors create demand for quality, service and experiences that are special to the place. Visitor spend generates a positive cycle of business confidence and investment. And visitor support of local heritage and culture energises civic pride. Currently the visitor economy in the Marches is underperforming relative to its assets and location. The total volume of visits is low, per head spend is below the England average and most visitors are on a day trip<sup>3</sup>. Consequently, many of the economic and social opportunities are lost.

A lack of coordinated activity and funding means that, over time, other destinations have got ahead. Therefore, the counties of Herefordshire and Shropshire, and Telford have a very low profile in the marketplace. A lack of strategic support for the visitor economy, changes to how destination activity is organised, under-resourcing and a tendency to fragment funds across a wide geography have all taken their toll on the market positioning of the Marches and in delivering a consistent high-quality visitor offer.

<sup>3</sup> Analysis of Visit England data. More detail to be found in Marches Evidence Base Paper, April 2019, Blue Sail

## THE STRATEGY

This strategy is about significantly raising the game to ensure the visitor economy achieves its economic potential as a sector and contributes to delivering the wider economic and quality of life objectives for the Marches. The local authorities need to work collaboratively to market, develop and manage the destinations in the Marches; that requires making better use of existing resources and unlocking new resources. The objectives set out in this strategy cannot be achieved unless significant additional funding is made available.

In addition, all three local authorities have recently declared a climate emergency and the aspiration to achieve net zero carbon by 2030. This strategy is supporting this environmental aspiration through its priorities, how it delivers its actions, and how it measures progress.

The strategy is about destination marketing and about the intelligent integration of the visitor economy with place making and culture. It is about supporting tourism businesses to thrive, whilst sustaining the environment and supporting inward investment.

The strategy focuses on the best-known townscapes and landscapes, investing in them to create great places and great experiences, and taking those places to market in new ways that resonate with target visitor markets. The marketing will attract higher spending visitors to the area throughout the year and will profile the area as a good place to live, work and visit. It is about ensuring that businesses have access to the support needed to take advantage of the opportunities of the visitor economy.

## 2 LOOKING TO THE FUTURE

### AIM

To deliver the full potential of a sustainable visitor economy as a contributor to wealth and local jobs, and to ensure the visitor economy is a showcase for the excellent quality of life that Herefordshire, Shropshire & Telford offers to everyone, whether they come for a day or stay for a lifetime.

### OBJECTIVES

There are five objectives that create the focus for the strategy.

#### Objective 1

To raise the profile of Herefordshire, Shropshire and Telford & Wrekin as a distinctive short-break destination within target markets, to showcase the special quality of the place and its people, and to use targeted promotion to drive more visitors and higher spend.

#### Objective 2

To raise the profile of Telford as a destination for conferences, meetings and exhibitions in priority sectors and industries.

#### Objective 3

To grow the capacity of local businesses and organisations, to support their role as ambassadors for Herefordshire, Shropshire & Telford and to raise the profile of the visitor economy as a career choice.

#### Objective 4

To show leadership and direction in the public sector and lever the resources required for the visitor economy to achieve its potential.

#### Objective 5

For public sector partners and businesses to work together productively to deliver a competitive visitor economy.

## APPROACH

This strategy is underpinned with the golden thread of ‘Independent’ which acknowledges and celebrates the character of the people, the places and the type of experiences the area has to offer. ‘Independent’ is what differentiates the Marches from many other rural destinations.

The strategy focuses on the places that are recognised and have resonance in the marketplace. The prioritised towns, attractions and countryside features in this strategy provide the focus for investment and activity. They are the brands to take to market. Other places across the Marches will benefit but it is important to place effort where it will have most impact.

- County names – Shropshire and Herefordshire
- Towns & Cities – Telford, Hereford, Shrewsbury and Ludlow
- Attractions – Ironbridge Gorge World Heritage Site
- Countryside – Shropshire Hills and the River Wye.

The strategy also identifies several strong priority themes around which to develop and promote visitor experiences.

The Marches is the administrative name for the area – it is not a destination brand. It is the territory in which partners will collaborate cost effectively on delivering business support and create efficiencies for ‘behind the scenes’ coordination of marketing and promotion. The Marches defines the area in which local authority partners and the LEP will plan and facilitate the development, marketing and management of the visitor economy.

## ENABLERS

The essential ingredients to deliver the strategy are:

- Data and market intelligence – to create a baseline of information that is regularly updated to measure change
- Skills and entrepreneurship – to enable local businesses and organisations to achieve their potential and create thriving communities and destinations

- Place narrative and key messages – to create strong consistent destination marketing
- Strong and coherent leadership within the public sector across the Marches.

## **MEASURING SUCCESS**

The long-term target is:

- To raise the visitor spend to the England average and then
- To maintain and track visitor spend against the England average

Underpinning this target is to reduce carbon emissions and to develop visitor products and experiences which benefit biodiversity and the landscape.

In the next five years to 2024, partners will measure the success of the strategy in the following ways:

- Value of buy-in to annual marketing campaigns by local businesses
- Number of new promotional packages for priority themes and assets
- The profile of market towns and quality of the visitor experience measured through promotional coverage and visitor surveys
- Number of tourism and cultural businesses engaged through the Growth Hub programmes
- Number of tourism and cultural businesses that have taken positive action to reduce carbon emissions
- Number of apprenticeships secured in tourism and cultural businesses
- Levels of project funding achieved from national and regional programmes
- Additional people resources dedicated to tourism.



## 3 STRATEGIC LANDSCAPE & MARKET TRENDS

### THE STRATEGIC LANDSCAPE

Over recent years there has been a move towards working in larger territories to give regions a stronger negotiating voice with government, to work across boundaries on major infrastructure projects and to create economies of scale in times of reduced public sector funding. The Midlands Engine and the West Midlands Growth Company are seeking to maximise the opportunities arising from HS2 for example, and partners are working together using airport hubs to strengthen international investment. Both organisations recognise the importance of the visitor economy and work predominantly on international tourism where activity and campaigns can add value to the work undertaken by individual destinations.

To counterbalance planning across large territories, there is a trend towards local neighbourhoods celebrating local identity by using meaningful community consultation to shape places and influence decision-making. This community engagement frequently prioritises wellbeing, inclusion and the environment.

For many years public sector funding has focused on cities as the economic powerhouses but there is now a recognition that smaller historic and market towns are struggling to find a role in evolving economies. These places often lack the digital infrastructure to make doing business easy and effect knowledge transfer. Town centres often struggle to find a mix of activity that supports their local economies. Limited job opportunities make it hard to retain graduates and younger people. There are new funding schemes that support market towns. The visitor economy has an important role to play in the vitality of market towns. The historic character of these towns appeal to visitors; they are where visitors to the surrounding countryside come to eat, stay and shop. Visitors seek out the independent, distinctive and local experiences these towns can offer. The Marches is well placed to tap into such trends and opportunities.

At the time of writing this strategy, the UK is in the process of exiting the EU. The terms of departure are yet to be finalised, but EU funding sources have now ended. New UK Government funding sources have been announced but the detail of those is still awaited. It will be important for partners to keep a watching brief on new funds and identify opportunities that can support projects to deliver this strategy. Tourism projects should be integrated into wider regeneration initiatives. Tourism planning also needs to positively respond to the challenges of climate change and associated loss of biodiversity by recognising and supporting tourism activity that promotes good environmental practice and which supports wildlife.

## MARKET TRENDS

There are any number of social, economic, long- and short-term trends which affect a visitor's decision making and behaviour. Those which present most opportunity for the Marches are shown here.

The table below describes the trends and the implications for the Marches and for this strategy.

These trends show the importance of being market focused. People have a huge range of holiday and leisure break options and will tend to choose those which they are aware of, best fit what they want and make it easy without them having to work too hard.

1. Getting What I Want



2. My Kind of Place



3. Pictures Not Words



4. Pursuit of Real



5. Leisure Upgrade



Trend	What it is	Response
Getting What I Want	Customer is in control. Being able to choose exactly what you want, when you want it. Not prepared to put up with second best. Time is limited so want to make sure that the choice is right.	Ensuring profile and awareness of the destination. Providing the right information at the right time. Making the choice manageable by curating what's on offer. Making booking clear and straightforward.
My Kind of Place	People choose places that reinforce their sense of identity and values: places that will say something about them to others. For some this will involve 'bragging rights' and extensive sharing.	Targeting the right people with the right offer and not trying to be 'something for everyone'. Clear messages and look and feel in marketing communications.
Pictures not Words	Power of images - online is increasingly visually driven reinforced through social platforms like Instagram, Youtube. Vloggers rather than bloggers.	More images and fewer words in marketing communications – but they have to be the right images tailored to the target market.
Pursuit of Real	Desire for authenticity and not mass-market tourism. Real rather than manufactured. Getting under the skin of a place. Live like a local. Local recommendations, authenticity.	Support development of authentic experiences which are 'of the place' – culture is particularly good at this. Visitor welcome and hosting. Lever local recommendations – directly and through social platforms.
Leisure Upgrade	Using leisure time productively and meaningfully. Extending interests into vacation time. Challenging self – physical or intellectual.	Opportunities to learn or acquire new skills – courses, taster sessions. Particularly relevant to food & drink, crafts, outdoor exploration and activities. Beginners through to experts.

## 4 CURRENT PERFORMANCE

### VISITOR ECONOMY IN THE MARCHES

There is patchy data about the performance of tourism in the Marches making it difficult to get a comprehensive picture of performance and change. An early action is to commission visitor data for the Marches to enable the three local authorities to monitor performance effectively on an ongoing basis. This is essential to make a case for the visitor economy, to measure the collective impact of the strategy over time and for the Marches to benchmark its progress against other destinations.

Based on data from national tourism surveys, approximately 21 million tourism trips are made annually to the Marches<sup>4</sup> with visitor spend amounting to an estimated £790 million. Visitors to the Marches directly support approximately 25,000 full-time equivalent jobs<sup>5</sup>.

A closer examination of headline figures shows that 90% of these trips are day visits accounting for 60% of spend. Both short break trips and overnight business visitors also spend below the national average. In line with most UK destinations, the majority of overnight trips are made by UK residents<sup>6</sup>.

	Day visits	Domestic overnight trips		Overseas trips*	
	Ave spend per day	Ave spend per trip	Ave spend per night	Ave spend per trip	Ave spend per night
Herefordshire	£25.58	£176	£55	£331	£43
Shropshire	£24.45	£173	£60	£326	£49
Telford & Wrekin	£18.02	£142	£55		
<b>The Marches</b>	<b>£23.80</b>	<b>£168</b>	<b>£57</b>	<b>£329</b>	<b>£45</b>
England average	£34.65	£187	£65	£486	£57

Sources: GB Day Visits Survey; GB Tourism Survey; International Passenger Survey, Visit Britain

\* Figures for overseas trips are for Hereford & Worcester (old county definition) rather than Herefordshire. England average spend figures for overseas trips exclude London.

<sup>4</sup> VisitEngland figures for 3-year average, 2015-2017

<sup>5</sup> Shropshire 14,767 (investinshropshire.co.uk); Herefordshire 5,462 (STEAM 2015); Telford & Wrekin 4,448 (Telford & Wrekin DMP 2014/17)

<sup>6</sup> See Marches Evidence Base Paper, April 2019, Blue Sail for full data and analysis

## THE VISITOR EXPERIENCE

The Marches visitor offer is made up of attractive landscapes and interesting townscapes. The Shropshire Hills and the Wye Valley along with the River Wye are the best-known landscape features. The Shropshire Hills and Wye Valley are both Areas of Outstanding Natural Beauty, a designation that recognises their significant landscape and wildlife value. The Shropshire Hills AONB has been awarded Europarc Federation status as a sustainably managed destination. The River Severn also passes through Shropshire and the town of Shrewsbury. There are branded routes including Offa's Dyke Path National Trail, The Shropshire Way and the Herefordshire Way. The county towns of Hereford and Shrewsbury offer good heritage and independent shopping experiences, and Ludlow has an established "foodie" reputation. Ironbridge Gorge World Heritage Site is a destination attraction. Telford's tourism is best known as a conference town. In addition, there is a wealth of small villages and market towns which are part of the heritage and the countryside landscape, though many offer limited opportunities for visitor spend.

There is a selection of visitor attractions including several National Trust properties and a calendar of events across the Marches, held mainly on weekends between May and October. Food and drink events are particularly prominent. The crafts offer is good and the most distinctive element of the cultural offer. Much of the Marches area is recognised among enthusiasts as rewarding walking country. There are various small-scale activity centres and facilities. The area does not have a strong reputation around a specific activity or sport, though the Shropshire Hills are known for gliding and mountain biking by enthusiasts for these activities. Most of the attractions and accommodation businesses are small and independent with varying quality and differing approaches to promotion. There are clusters of hotels in Shrewsbury and in Telford, and a large number of non-serviced accommodation establishments across the Marches, many of which are small-scale life-style businesses, and some are part of farm diversification.

Collectively this offer presents several challenges which are addressed in this strategy.

- **The Marches lacks a strong driver to choose the area over other destinations.** In a highly competitive marketplace awareness and visibility is essential though very challenging for destinations without iconic appeal (VisitEngland research has shown that only the Lake District and Cornwall have any significant widespread awareness and appeal for the domestic market)
- **Creating and communicating a clear competitive positioning is problematic for the Marches because the offer is diverse and small scale** – there are few strong high-profile brands with money to invest in marketing
- **The Marches sits among some big destination brands** – Wales, Lake District, Peak District, Cotswolds. The Marches offer is different. It is a small-scale, niche destination. It is important the area plays to that potential strength rather than try to compete with the big destination brands.

- **There has been a lack of destination marketing and collaboration** – no one is creating an overall sell for the counties and places within the Marches, neither is anyone is selling experiences or packaging the offer in a targeted way. Development and promotion are fragmented and largely product rather than market led.
- **Investment by individual businesses is constrained by size and profitability** – leading to uneven investment and variable quality of product, service and fragmented promotional messages.
- **There is a lack of public sector resources for the visitor economy and limited partnership working** – there is no successful destination marketing in the UK that is not public sector led. Businesses are less likely to have the confidence to invest if there is no communication about the local performance of the visitor economy, destination marketing or targeted business support. Tourism is one sector in the wider economy and the case and priorities for investment in tourism are part of the wider strategic investment decisions made by the public sector.

## 5 OPPORTUNITY

The big opportunity for the visitor economy Marches is to use the concept of **‘Independent’**. It is the golden thread that runs through the Marches and plays to the trend of searching for the authentic and the distinctive. Independence is part of the heritage of the Marches. The strong sense of identity in the area results from contested land between England and Wales. The Marches is inhabited by generations of families and also newcomers attracted by its individualism. It is a place that is independent in thought and spirit and that brought the Marches innovations such as the Iron Bridge and Flaxmill Maltings. That creativity continues today with many artists and artisans choosing to live and work in the Marches.

Independent businesses dominate and larger brands, even when no longer family-owned and run, make a strength of their distinctive identity, their location and their provenance. The tourism products and services on offer are small-scale, authentic and of the place: independent in feel and character. The variety of building styles and materials, many locally quarried/sourced, add to the sense of individual and independent. As well as being true to the place the idea of independent is an attractive one to potential visitors conveying the distinctiveness and authenticity of the place and the experiences available.

While this golden thread is the starting point of the narrative for the Marches, it needs to be carefully developed and curated. ‘Independent’ is a flexible concept that can be used for the county or for individual towns for marketing and promotion.

### LEVERAGING THE ASSETS

Research shows that the Marches is not a familiar name among potential visitors and is not used to any great extent in describing and promoting the area. The places and destinations which have recognition and resonance are:

- County names – Shropshire and Herefordshire
- Towns & cities – Hereford, Shrewsbury, Ludlow and Telford
- Attractions – Ironbridge Gorge World Heritage Site
- Rural locations – Shropshire Hills and River Wye

There are not the resources to create a new Marches destination brand. It makes better sense to use the recognised place names in destination marketing and to focus on the sub-county locations for development and investment to facilitate tourism growth. Place names also help to prioritise locations for investment.

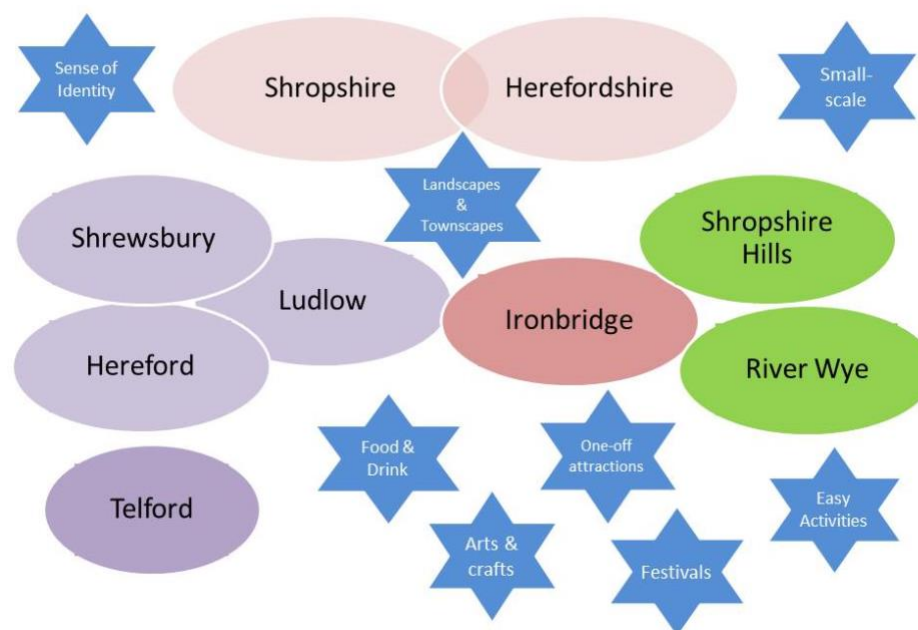
In addition to specific places, the audit of the products and experience has revealed common features and strengths across the Marches that differentiate it from other areas. These ‘thematic assets’ – shown in the table below – fall into different types. Some assets are specific products and experiences, whereas others are more about the character of the area and run through the experience the Marches has to offer. Some examples are included here for illustration – there are many more.

THEMATIC ASSETS	For Example.....
<b>Underpinning Character</b>	
Landscapes & Townscapes	Shropshire Hills, River Wye, Ironbridge Gorge World Heritage Site, Black & White Villages, Castlesacc
Sense of identity	Local pride and character of people, sense of heritage, creative incomers
Small-scale	Small towns & villages, small businesses, independent shops
<b>Sector Strengths</b>	
Food & Drink	Cider and beer producers, tours, museums, local produce, farmers markets, Ludlow Farm Shop, young entrepreneurs
Arts & Crafts	Designers and makers, art & small studios, Old Chapel Gallery Pembridge, Market Hall Shrewsbury
<b>Supporting Assets</b>	
Easy Activities	Walking, cycling, canoeing, kayaking, riding
One-off attractions	Ironbridge Gorge Museums, Hereford Cathedral & Mappa Mundi, owner designed and managed Gardens, Cosford
Festivals	Ludlow Food Festival, Borderlines Film Festival, Shrewsbury Cartoon Festival, Nozstock, Balloon Fiesta in Telford Town Park, World Heritage Site Festival in Ironbridge, Shrewsbury Folk Festival, Shrewsbury Flower Show and a plethora of small-town festivals.



One of the defining features of the Marches is its relatively small scale – its urban areas, its hills, its locally owned businesses, its organisations. While this is part of its appeal; collaboration, pooling resources, linking, connecting and packaging will be essential to achieve a critical mass of experiences to take to market.

Together these places and thematic assets make up the tourism ‘ecosystem’ of the Marches – shown in the diagram below. The economic opportunity both for tourism directly and in its enabling role lie with these assets. Thematic assets provide the route to delivering authentic, distinctive experiences which encourage visitors to explore and make it easy for them to understand the character and geography of the place. The place assets are the tourism hubs – focal points to access the thematic assets.



## 6 VISITOR MARKETS

### LEISURE MARKETS

The profile of visitors to the Marches currently appears to be predominantly older 'empty-nester' couples; and there is certainly a good fit between that market and the current product offer. However, if tourism is to contribute to wider economic aspirations there is a need to target younger people (some with families) with the potential to consider the Marches as a place to relocate. Drawing on VisitEngland's segmentation research as well as that of the other national tourist boards, a bespoke segment – Independent Explorers – has been developed. Targeting this segment will open up an influential new market which will support the repositioning of the Marches without discouraging the existing market.



#### Independent Explorers

- Age late 20s - 40s
- Professionals
- Couples, groups and families
- Interested in culture of a place
- Attracted to places off the beaten track
- Activities – dabblers and testers
- Food & drink very important
- Want interesting, quality places to stay, eat, drink
- Enjoy cool, niche festivals
- A bit of quirkiness a good thing



It is easier to reach and persuade those living nearer a place to visit; this is true of all destinations. Awareness is higher, access is easier, and the risks are less. The Marches is within easy reach by train and car of several large conurbations.

The approach should be to target Independent Explorers within the 'Regional Arc' which runs from Liverpool and Manchester, through Birmingham, and south to Bristol and Cardiff.

Of course, individual businesses may have a different target markets depending on their offer. However, for the Marches area the focus should be on targeting high-value Independent Explorers. This will guide marketing activity and product development.

### BUSINESS VISITORS

Most business visitors will have no choice in their destination, the venue is determined by other factors. For business tourism the opportunity lies with conferences and meetings. The leading venue is Telford International Centre but there is a range of smaller, high quality venues throughout the Marches including country house hotels and cultural venues.

Again, to fit with the economic development agenda the priority for conferences and meetings should be attracting national associations and regional corporates (from within the Arc) in the priority economic sectors identified in *The Marches Strategic Economic Plan*. In addition to the direct value generated from their spend, from a strategic development point of view it is equally important to showcase the area to support inward investment, relocation and recruitment. That means also targeting opportunities to host appropriate 'lifestyle' events.



## 7 PRIORITIES

There are four priorities for the strategy – destination marketing, investing in visitor experiences (that provides content for destination marketing and strengthens the collective offer), investing in place and investing in people.

### **DESTINATION MARKETING**

The rationale for collaborating on destination marketing is to:

- Make an impact in marketplace with more resources and a bigger offer
- Build the profile of Herefordshire, Shropshire and Telford & Wrekin for leisure visits
- Build the profile of Telford for business tourism linking its promotion to other venues

The rationale for collaborating on developing visitor experiences is to:

- Focus and pool resources
- Make it easy for visitors to be inspired, choose, plan and book
- Enhance and tailor the experience for the target segment

Research<sup>7</sup> suggests that one of the challenges is a lack of awareness and understanding of the Marches as a place to visit, invest, work, live or study. Destination marketing can support a wider invest, work, live and study agenda but to do it well requires presentation of the ‘big picture’: it is not about tactical campaigns focused on short term sales. Fundamental to destination marketing is a consistent story or place narrative. It is a commonly agreed

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<sup>7</sup> Arkenford Research 2010

way of describing a place, that everyone uses when they are planning how to invest in improvements or new experiences, and when they are talking to people through their marketing. It is a short and simple story of around 500 or so words and images – that makes it clear what is special and different about that place. It doesn't overpromise. It goes with the grain of the place and is authentic and true. While true to the place the narrative is articulated in terms that will appeal to the target market. It is not marketing copy, but it should inform the messages and marketing communications; and just as importantly it should inform the priorities for product development and investment.

*Ireland's Ancient East is a destination brand bringing together a number of local authority areas within the Republic of Ireland. Its excellent website includes one of the best [itinerary planners](#) around.*

The place narrative for the Marches should be based on the golden thread of 'Independent'; it should incorporate the primary place assets and thematic assets identified in this strategy.

The Marches area needs a single tourism website or a portal which provides the entry point to the county websites. This website must inspire as well as inform, lead with a strong positioning based on the golden thread and be designed to appeal to Independent Explorers. An image bank of high quality still and moving images visualising the proposition and themes will be essential to use for tourism and place promotion across all marketing channels, e.g. website and on social media.

Here is an example of a portal for the [North East](#) of England which has detail on the portal site and then links through to destination sites and here is the [South West](#) which provides a simple portal that acts as a wrapper for the individual websites that cover the region.

Destination marketing will also require a multi-channel campaign targeting Independent Explorers within the in the target geography identified above. The campaign will be supported by digital platforms providing inspiration, information and engagement will support this. A PR programme targeting third parties such as VisitEngland and travel journalists will be cost-effective method of securing consistent messaging and achieving profile.

Telford will be the lead for conference and meeting tourism but there are a range of smaller, unique and quirky venues throughout the Marches. A dedicated conference and meeting venue website will support business tourism across the area by headlining the Telford International Centre and providing opportunities for smaller establishments to reach the market. Examples of good conference and meeting venue websites are [Cheshire](#) which makes a virtue of the views and the outdoor spaces of its venues located across the County, and [Jersey](#) which targets priority sectors.

Businesses, especially SMEs, tends to be less willing to support destination marketing activity because it is not focused on short term sales and immediate returns. However larger, more strategically minded businesses are more likely to see the value of creating a profile and reputation for the area through destination marketing and the benefits that it will bring their business. An approach which seeks their commitment and investment is important. And there are sales opportunities which can be integrated within a destination campaign for smaller businesses to buy in to.

## INVESTING IN VISITOR EXPERIENCES

The aim is to have more excellent experiences which are tailored to Independent Explorers designed to persuade them to visit and spend. The focus for developing visitor experiences should be the destinations and thematic assets identified in this strategy because that is where the greatest opportunity lies. It will mean focusing on encouraging, supporting and marketing experiences around the thematic propositions of locally produced and sourced food & drink, arts & crafts, festivals, activities and one-off attractions.

It will be important to package thematic assets into experiences for visitors. 'Packaging' is used here to mean bringing together various assets to create a bigger proposition to take to market rather than a package meaning accommodation plus transport plus activity. Flexible packaging provides opportunities for smaller establishments to achieve greater reach in the marketplace, supporting business growth.

### Trails

Trails are a particularly effective way to package and present thematic experiences and link assets with landscapes and villages across the Marches. Trails reassure visitors there is enough to do, provide choice and encourage exploration. There is not necessarily an expectation that visitors will follow the length of a trail, they may pick and choose from it. The [cider trails](#) in Herefordshire are a good example. Other thematic opportunities for the Marches are craft trails developed around artists/makers studios, galleries and outlets; farm shop/farmers market trails; cafés/teashops.

Trails can be walking, cycling or driving according to locations and routes and take in towns and countryside. In some cases, it may be possible to align stretches of trails with branded walking or cycling routes to make good use of existing quality infrastructure. Information about the trails can be provided online or via apps, which makes them accessible to visitors and easy and cost effective to update, adapt and expand for different interests and ages.

*The England's Historic Cities [app](#) uses innovative new mobile technology to help visitors experience twelve historic locations. Using phone cameras at various trigger points, visitors can uncover augmented-reality displays, 3D reconstructions, and 360-degree panoramas that tell the unique stories associated with the site.*

**The creative use of landscapes, townscapes and venues**

The creative use of landscape and townscape can add value to experiences. For example, pop-up events, festivals or performances taking place in striking locations such as one of the many castles in the Marches, on the River Wye or along the River Severn corridor, in Telford Town Park or in one of the highly individual gardens such as Hergest Croft or Acton Scott Historic Working Farm. These types of venues are variously connected with strong themes, located in priority places and are associated with 'independent' in some way.

**Festivals**

Festivals are a reason to visit now and create more to do and see. Presenting the Marches as the natural home to interesting, niche and quirky festivals will profile the Marches particularly among the younger/family end of the Independent Explorers. Festivals present the opportunity for creative collaboration across assets, for example showcasing local food & drink and crafts, local artists/makers running workshops and creating learning opportunities.

**Other opportunities**

A priority will be to develop and promote the branded routes for walking and cycling focusing on the Shropshire Hills, the River Wye and the River Severn corridor. New products that encourage more visitors to use sustainable travel such as guided tours and cycling with luggage transfer can make more of these assets, open them up to target markets, add value to the experience and support the sustainable tourism ethos that is at the heart of the Areas of Outstanding Natural Beauty (AONB) in the counties.

Exploiting the trend for learning and using holiday time productively offers many opportunities for new experiences; for example activity 'taster' sessions for families, food or craft workshops or learning and practising a new countryside skill.

Ease of booking is important in converting interest to visits. Collaborations with booking platforms such as Airbnb and local hosts can not only help to improve quality, but also encourage local recommendations.

Here is a priority set of actions for marketing and promotion, and for visitor experiences.

Priority Area		Headline Action
<b>Destination Marketing</b>	Marketing Collateral	<ul style="list-style-type: none"> <li>• Develop a consistent place narrative, strapline, key messages, look &amp; feel for the Marches based on the golden thread of 'Independent' designed to target Independent Explorers and ensure this runs through all marketing communications</li> <li>• Create one website for whole Marches area with county/place sections OR a portal with links to improved county sites which cross-sell</li> <li>• Create one business tourism website with focus on Telford but including quality rural venues</li> <li>• Commission an image bank which visualises the proposition and the places and thematic propositions</li> </ul>
	Campaigns	<ul style="list-style-type: none"> <li>• Develop and implement a multi-channel marketing campaign targeting Independent Explorers within the Regional Arc</li> <li>• Create/ensure digital platforms provide inspiration, information &amp; engagement – website/s, Instagram, YouTube, Pinterest, Twitter</li> <li>• Implement an 'Influence the influencers' PR programme targeting VisitEngland, travel guides/sites, journalists</li> </ul>
	Industry buy-in	<ul style="list-style-type: none"> <li>• Develop and actively sell a proposition for big players to support campaigns through an account management system</li> </ul>
<b>Visitor Experience Development</b>	Tourism hubs	<ul style="list-style-type: none"> <li>• Focus on Ironbridge as the headline attraction for the Marches, linking it with other attractions and developing its rural hinterland for activities etc</li> </ul>
	Thematic assets	<ul style="list-style-type: none"> <li>• Prioritise, encourage and support experience development around key propositions i.e. locally produced food &amp; drink, arts &amp; crafts, easy activities</li> <li>• Explore opportunities for collaboration across assets e.g. local food &amp; drink and/or crafts at festivals</li> </ul>
	Creative packaging	<ul style="list-style-type: none"> <li>• Link themes with landscapes and villages e.g. café trails, pub trails, crafts trails</li> <li>• Develop and promote branded routes for walking and cycling, focusing on Shropshire Hills and River Wye plus e.g. guided tours, cycling with luggage transfer</li> </ul>



	Creative packaging cont	<ul style="list-style-type: none"> <li>• Develop and promote learning opportunities e.g. activity tasters, food workshops, arts &amp; crafts workshops, traditional countryside skills.</li> </ul>
Priority Area		Headline Action
	Imaginative use of digital	<ul style="list-style-type: none"> <li>• Create apps e.g. for trails</li> <li>• Develop channels for local recommendations e.g. through social media platforms or destination website/s</li> <li>• Develop partnerships and links with booking platforms e.g. Airbnb</li> </ul>

## INVESTMENT IN PLACE & PRODUCT

There is major infrastructure investment planned across the Marches to improve connectivity and to encourage inward investment. And there is place investment happening too, for example in Hereford and in Wellington. That investment is designed to support vibrant places and growing populations. These investments are not led by the visitor economy, but it is essential to incorporate the needs of visitors within them. And to recognise that well designed places encourage visitors to stay longer and spend more. New schemes, such as the [Future High St Fund](#), offer potential to deliver town centre improvements that support tourism.

Hereford, Shrewsbury and Ludlow are the destinations in which to focus place investment for visitors. They have the capacity and breadth of offer to attract more visitors now. The added value will be using their assets creatively and taking them to market more effectively with a focus on independent shopping and creating new cultural experiences. The towns provide opportunities to showcase local food and crafts in shops, hotel receptions and at local markets, creating a tangible link between town and countryside. Towns can lead the way in using heritage buildings creatively e.g. for light shows, outdoor theatre. Place investment in Telford should be primarily driven by the needs of its business visitors. Ironbridge is already a leisure tourism hub and the wider Telford area should aim to deliver a quality of built environment commensurate with the World Heritage Site status of Ironbridge Gorge.

*Regeneration projects in Ulverston, Cumbria included transforming County Square, previously a roundabout, into an award-winning public space.*

*Ripon, Yorkshire used “facelift” grants from the previous Single Regeneration budget to reinstate windows and restore shopfronts.*

*Todmorden, West Yorkshire engages local people in designing and maintaining local spaces – home to the first Incredible Edible (unloved public spaces planted with vegetables available for all to harvest), local murals and community designed interpretation have all encouraged more environmental and creative businesses into the town.*

The Shropshire Hills ([The Shropshire Hills Sustainable Tourism Strategy](#))<sup>8</sup> and Wye Valley are the key hubs for investment in the countryside, with a focus on investment in facilities to support activities, e.g. walker/cyclist friendly accommodation, and creating more spend opportunities in villages, e.g. through tours, local events.

#### **SOME PLACE INVESTMENT PRIORITIES FOR THE VISITOR ECONOMY**

- Clear road and pedestrian signing, and orientation to enable visitors to explore with confidence
- Encouraging the maximum length of stay in car parks e.g. pay as you leave
- Attractive public spaces to spend time to enjoy the place and for events, activities and food/craft markets
- Quality street furniture and paving that reflects the character of the place
- Public art and interpretation that adds interest, is thought provoking and uses digital solutions to tell multi layered stories in engaging ways without street clutter
- Well-kept shop frontages and interesting window displays
- Mix of independent shops, cafés
- Opening times to create early evening activity to extend the visitor day
- Good housekeeping of the public realm, e.g. graffiti removal, clean public lavatories
- Planning Department support of the conversion of first floor space to hotel rooms above pubs and restaurants, sympathetic hotel extensions and developments
- Repurposing heritage buildings for tourism purposes e.g. hotels (permanent), theatre productions (temporary).

#### **Accommodation**

To grow the value and sustainability of the visitor economy requires more overnight visitors. The current supply of hotels is relatively modest and concentrated in Shrewsbury and Telford. There are few branded hotels, most establishments are three-star and there are few boutique hotels. Telford is the business tourism hub within the Marches and offers value for money accommodation. Non-serviced accommodation is more widely spread across

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<sup>8</sup> Shropshire Hills AONB holds the EUROPARC Federation Charter for Sustainable Tourism. This prestigious award links them to hundreds of protected areas across Europe and the wider world.

the two counties, but the number of units is very small at each establishment and camping dominates. There is a noticeable lack of more contemporary non-serviced accommodation like glamping, lodges and shepherd huts.

The last accommodation audit was undertaken in 2012 and while there have been a small number of developments since then, the lack of investment in refurbishment and extensions implies a static market at best, with capacity throughout the year<sup>9</sup>.

In Telford, the main conference town, there are opportunities to strengthen the conference tourism and related leisure through a refreshed business hotel offer and the introduction of contemporary brands, subject to suitable sites and demand. Targeting specific sectors, conferences and exhibitions will help to grow and evolve the conference offer to achieve higher value business.

Outside of Telford, a growth in new companies and the resident population indicates a market will emerge creating a demand for new hotels serving non-discretionary business tourism during the week and the wedding and visiting friends and relatives (VFR) market at weekends. Smaller distinctive properties and non-serviced accommodation is essential to create an economically healthy mix of establishments that meets the needs of target markets as well as local demand.

The challenge is ensuring current and future visitor accommodation meets the quality and facility expectations of the growth market opportunity. To enable that requires:

- A programme of business support that encourages investment in facilities, customer service and e-booking to meet market requirements – this should explore potential grant and loan schemes and ensure that countryside investment includes provision of facilities for activities e.g. drying rooms, equipment lock up space
- Planning and business support for local businesses looking to expand, e.g. rooms above pubs and restaurants – a trend in visitor accommodation
- Planning support for appropriate new visitor accommodation developments particularly in hub towns, in the Shropshire Hills and in the Wye Valley.

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<sup>9</sup> Marches Evidence Base Paper, April 2019, Blue Sail

- Advice and guidance on environmentally sustainable developments.

An occupancy and quality audit of existing accommodation stock will help pinpoint areas for immediate focus and plan a programme of support.

### **Infrastructure Investment**

From time to time new infrastructure projects of scale will come forward. These projects may be for new visitor attractions, destination accommodation and restaurants or for activity centres. They may include repurposing buildings, new build or substantial upgrades, diversification and next phase developments to existing businesses. A priority is to create new multi-user trails that connect places and attractions that can attract new visitors and encourage visitors to explore further on foot and by bike.

Tourism infrastructure projects of scale create opportunities to profile the area, create new reasons to visit and to stay longer. They demonstrate a thriving visitor economy because businesses want to invest in places which they perceive as successful and have the vision and creativity to recognise and support good ideas. New large-scale tourism investments can attract and stimulate further business investment. Therefore, it is important that new tourism infrastructure is supported and encouraged by public sector partners, in particular where that development creates the potential to reinforce the 'independent' and environmental credentials of the Marches and strengthens leading themes and places.

### **INVESTMENT IN PEOPLE**

The skills and entrepreneurship of tourism businesses are an enabler for this strategy. Businesses need to understand the marketing, customer service and facility expectations of growth markets and perceive business value in making the necessary investments to attract them. Visitors can create a new customer base or open new opportunities for businesses in agriculture, retail and arts & crafts. The expectation for businesses to demonstrate environmental good practice is likely to grow within certain markets as the global climate emergency becomes more mainstream and better understood. Businesses need informed information, support and advice to bring forward innovation and best practice in energy efficiency, waste reduction, local sourcing and wildlife recovery.

The retention of university graduates and young people in the countryside is a well-documented challenge across the UK. Visitors create a demand for local arts and crafts that can help incentivise young creative talent to start-up businesses locally, reinforcing quality of life values and helping to support vibrant communities.

The visitor economy supports a wide range of jobs in the hospitality and transport sectors, in culture and in retail. These jobs are spread across the private, public and third sectors creating a range of career opportunities. There is a job to be done in raising awareness of tourism as a career option including supporting small business start-ups.

The visitor economy and the cultural sector employ many volunteers. Volunteering can enrich the lives of those involved, support inclusion and introduce people to new career opportunities. It is a positive connection between communities and visitors and creates local ambassadors. Training and business support should ensure it provides support for volunteers and recognises the contribution volunteering makes. Local communities can be important ambassadors, welcoming visitors and providing personalised information and ideas on what to do. Communities should be encouraged to visit their local attractions and use the facilities to enable them to recommend with confidence. Garden open days, special discounts for local residents and online information and promotions can all incentivise local people to support local tourism businesses.

It is important to recognise that tourism and culture businesses are frequently micro businesses, sometimes, owner-managers operating in an industry which is at its busiest at weekends, in the evenings and during holiday periods. Training and business advice need to be delivered in locations that are convenient and relevant, and to take place at times of the day, week and year that are tourism-SME-friendly.

For the visitor economy to thrive requires:

- Bringing together existing tourism and culture networks to cross fertilise ideas, contacts and expertise, and to facilitate purposeful business opportunities e.g. meet the buyer sessions (where tourism businesses are matched with local suppliers at specially convened events), product showcasing (at conferences, in hotel receptions, restaurants, cafés etc), partner programmes for conferences, training for volunteers, and developing new visitor experiences and packages
- Providing tourism businesses with the knowledge, tools and support to actively contribute in destination marketing to support public sector investment with a particular focus on digital skills and using social media – these tools might range from online discussion groups and toolkits, to online training and sessions that also provide networking opportunities or an opportunity to visit a local attraction or hotel to develop local product knowledge.
- Creating a one-stop shop for tourism skills and training support that packages existing provision and plugs any tourism-specific gaps – using the three LEP Growth Hubs as a focus for delivery and presenting in a visitor SME friendly way

- Creating a Tourism Careers Forum as a funnel for mentoring, apprenticeships and work shadowing opportunities with schools and colleges. [Kent Hospitality and Tourism Guild](#) is a good example of how the tourism sector works in partnership with the local authority, education providers and other agencies to encourage more people to consider a career in tourism.
- Advice on target market opportunities for landowners thinking about entering the tourism marketplace e.g. developing visitor accommodation, developing activities for visitors.

## 8 WHAT NEEDS TO HAPPEN

Here are the three overarching actions needed to inform the delivery of the strategy and monitor change over time.

- Commission a baseline visitor survey, repeated every two to three years, carried out across the Marches, to understand visitor profiles and perceptions, to monitor impact and responses to product investment and promotional activity
- Use the VisitEngland data on visitor numbers and spend as a benchmark to track economic performance
- Commission an accommodation study to understand the volume, type and performance of existing stock, identify gaps and opportunities (types of accommodation, locations, developers) to help support planning applications and inward investment.

Here are the main actions divided into business facing and visitor facing activity.

BUSINESS FACING ACTIONS	VISITOR FACING ACTIONS
<ol style="list-style-type: none"> <li>1. Undertake an audit of existing business support to identify tourism business needs and determine how gaps are to be filled</li> <li>2. Develop a bespoke business support programme for tourism businesses</li> <li>3. Create an online one-stop shop for tourism skills and training support using the three LEP Growth Hubs as a focus for delivery</li> <li>4. Facilitate business to business activity e.g. Meet the Buyers, using tourism and cultural networks</li> <li>5. Create a Tourism Careers Forum and support its activities</li> </ol>	<ol style="list-style-type: none"> <li>6. Develop a place narrative and associated materials, and use consistently across marketing communications</li> <li>7. Create one website for Marches area or a portal linking to the individual county destination sites</li> <li>8. Create one business tourism website with focus on Telford and including quality rural venues</li> <li>9. Develop and implement an annual multi-channel marketing campaign, supported by managed social media activity across relevant platforms, and a PR programme</li> <li>10. Develop and actively sell a proposition for big players to support campaigns through an account management system</li> <li>11. Develop, support &amp; promote visitor experience packages for the thematic assets</li> </ol>

## 9 DELIVERY

To do more, requires more people and funding. It means coordinating and using existing resources to best effect to lever third party funding, to optimise skills and experience of existing staff and to augment them where needed. Stronger structured collaboration across the three local authorities is essential but will not be enough, especially in the next three years when the Marches will need to work hard to deliver big changes. There is a need for more project and marketing funding and for more staff responsible for destination marketing and business liaison.

Over the last 30+ years there have been regional destination partnership organisations, originally Regional Tourist Boards that benefited from substantial national and local authority funding, and more recently Destination Management Organisations (DMOs). Declining public sector funding at both a national and local authority level, has meant that not all DMOs remain funded to a level which enables them to deliver a full suite of visitor economy services that cover destination marketing, development and management. The boundaries for DMOs vary, are often the same as for a local authority and, as a consequence, do not always make sense to visitors. In larger cities, DMOs are usually closely connected with inward investment and have a strong place marketing role. Some DMOs are no longer funded by the public sector. Some DMOs have industry membership schemes, others not. Experience from elsewhere shows:

- That declining local authority funding cannot automatically be made up by the private sector. When the private sector solely funds and runs a DMO or equivalent, the focus is around tactical marketing and promotion and the business support, product development and strategic links between tourism and the wider economy are not made
- Aligning a tourism partnership or organisation with the LEP strengthens the partnership and ensures tourism remains aligned with wider economic drivers and that SME support and infrastructure projects remain part of the remit for tourism
- Membership schemes require full-time support to work, are high maintenance require good business communications including regular events for businesses and an up to date well managed database of contacts. It can take a long while to develop a good membership scheme and it is costly to maintain and those costs may outweigh the benefits

*When a new Destination Management Organisation was set up for Aberdeenshire a couple of years ago it brought together areas which had not previously collaborated on tourism. To build relationships across the whole county two 'Business Engagement Executives' were appointed to work with businesses, develop collaboration, and take forward projects and special initiatives. See more about their role [here](#) and their job description [here](#).*



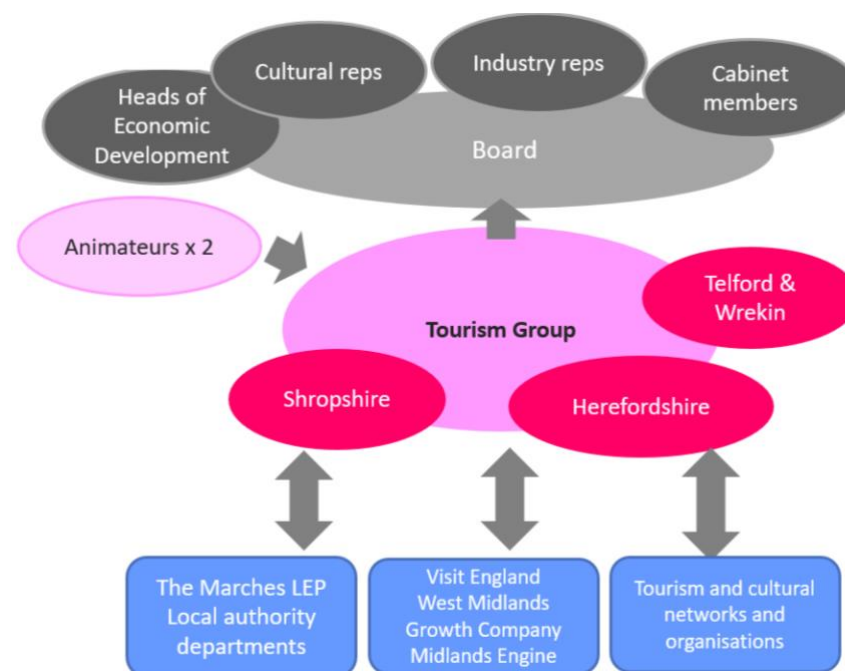
Public sector agencies and local authorities are looking at new ways of working together; many organisations are in flux.

Taking account of current trends and looking at the needs of the Marches, the recommendation is to establish a bespoke approach to reflect the commitment of local authorities to work together on tourism. It is a straightforward model that makes use of existing infrastructure and office space. It is not a formal DMO but draws on the best practice of that model in creating strong partnerships between local authorities and working with the industry. The suggested name is the **Destination Partnership for the Marches**. This title explains its territory and its status. The Partnership will be the guardian for the tourism sector across the Marches and the champion for the VES facilitating its delivery and responsible for:

- Strategic leadership
- Coordination and delivery of destination marketing & promotion
- Destination research and market intelligence, its communication to partners and using it to measure progress
- Product development & destination management
- Coordination of business tourism

Here is the proposed delivery structure (see right). Key points to note are:

- The Tourism Group - three local authorities working together at an operational level facilitating activity and working with regional organisations, local networks and the LEP
- The Tourism Group reporting to a Board which, through its membership, links visitor economy activity into wider economic development and cultural activity, and connects with the tourism industry and to policy through engagement with Cabinet members



- Two animateurs working with businesses to generate marketing collateral and coordinate business support – envisaged as funded 3-year posts, additional to local authority staff, working with local authorities across the area, which may provide the office facilities as match funding for staff salaries and on-costs

It is recommended that a delivery budget to cover core research, marketing activity and to provide a small match funding pot for specific initiatives requires a minimum £300,000 per annum. The costs of the animateur posts would be additional. Partners will utilise a range of national and regional funding schemes to deliver specific projects.

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