NORTH SHROPSHIRE and OSWESTRY

VISITOR ECONOMY STRATEGY

AND ACTION PLANS

2012 - 2017

'Collaborate to Compete'

A WAY FORWARD FOR

NORTH SHROPSHIRE and OSWESTRY

DESTINATION DEVELOPMENT PARTNERSHIP

FINAL REPORT

By

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‘The walker congratulates his own arrival at the place, and is grieved to think that he must ever leave it.’

Dr Samuel Johnson 1774 on Hawkstone Hall

We are grateful to the Steering Group and to the many businesses and individuals who gave of their time and expertise in the consultations and workshops in the preparation of this strategy and action plan.

CONTENTS

Acronym guide:

AWM	Advantage West Midlands
DDP	Destination Development Partnership
DMP	Destination Management Partnership
GVA	Gross Value Added
LEP	Local Enterprise Partnership (Marches – covering Shropshire, Herefordshire and Telford)
MTRP	Market Towns Revitalisation Programme
NSO	North Shropshire and Oswestry (geographic area descriptor)
RDA	Regional Development Agency
ST	Shropshire Tourism
TSB	(Shropshire and Telford) Tourism Strategy Board
VES	Visitor Economy Strategy
VFR	Visiting Friends and Relatives

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SECTION 1: INTRODUCTION TO THE NORTH SHROPSHIRE AND OSWESTRY VISITOR ECONOMY

1.01. The Nature and Purpose of this Visitor Economy Strategy

This strategy was commissioned by Shropshire Council in partnership with Whitchurch and Oswestry Town Councils, on behalf of the recently formed North Shropshire and Oswestry Destination Development Partnership (DDP). It is the third of the new Destination Development Partnerships within Shropshire Council's geographic area to produce a localised strategy and action plan to create greater resilience and better economic output from this sector. Throughout this document, North Shropshire and Oswestry is referred to as 'NSO', used as shorthand, *not* as a marketing proposition.

The term '*Visitor Economy'* has been increasingly used in the past few years as a more useful, widely embracing description of the activity which is greater than 'tourism' and includes the longer supply chain. It is also more of an eye catcher for politicians and other players, creating as it does a justifiably more serious feel for the industry and its significance.

The broader role of the 'visitor economy', rather than simply 'tourism' is seen nationally as a key driver of economic growth with the variation in definitions being:

- **Tourism** - a tourist visits somewhere that is **outside their usual environment**, i.e. coming from beyond the NSO area. Thus it is *where you are* and *where your spending* takes place that defines you as a tourist. Tourists are both day visitors and those staying overnight, for leisure, visiting friends and relations or for business. 'Tourism' is normally perceived by the non-tourism world as being mostly about accommodation, attractions, eating/drinking and often by overseas visitors
- **Visitor Economy** – there will be consumers taking part in a leisure visit *within their regular local economy* – for instance Wem residents going out for a walk round the Mere and then lunch at the Ellesmere Boat House. This encompasses the aspects that affect all visitor experience: all the elements that attract (or indeed deter) people: the quality of public places, transport systems, architecture, arrival points and sense of welcome, parking, information, cultural activity, etc. **All** require management, benefiting residents and visitors – supporting the accepted wisdom of 'A good place to live is a good place to visit.'

Indirect benefits accrue to **non-tourism businesses** from the visitor economy; enterprises not delivering tourism also benefit through local supply chains; such as the food wholesaler or baker who supplies restaurants and the local garage where visitors buy fuel and top-up food. Holiday cottages, pubs, hotels, farm attractions, etc. all support other businesses e.g. window cleaners, laundries, accountants and painter/decorators, all of whom would see reduced levels of business if the visitors stopped coming to the tourism operators.

The purpose of this strategy and action plan, in simple terms, is to:

- Review and reflect on all previous thinking and conclusions about the NSO visitor economic growth potential and the current performance of the area and its visitor products
- Identify and prioritise the activity most likely to increase **value** as well as volume – linking with the already prepared Marketing Strategy and its identified market segments
- Map the gaps in the provision and/or quality of those opportunities and indicate actions by which these should be addressed
- Work with the visitor economy partners to provide a clear route to those markets through action plans that will be adopted by all

- Ensure the actions are integrated within the wider backdrop of Shropshire's new administrative structure and plans, neighbourhood planning and the Shropshire Market Towns Revitalisation Programme (SMTRP). Also to link with neighbouring destinations and emerging funding streams, in order to give them the best chance of success.

Other variations of visitor activity that are explored within this strategy include:

- **Sustainable Tourism –** as defined by the World Tourism Organisation[1], sustainable tourism is 'tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities'.
- **'Slow' Tourism** – an approach seeking fewer, more engaging and meaningful experiences rather than trying to tick off all the sights. Visitors have time to make connections with the place, people and local culture. This benefits the destination's environment and local community and the visitor themselves.
- **Cultural and Heritage Tourism** - where a key driver of motivation, activity and participation is to make the most of the local cultural and heritage assets – which may include birthplaces or workspaces of authors, artists, etc., historic properties, industrial heritage sites, locations used in literature and film, etc, as well as to attend events/ arts activities at venues.

1.02. The Changing face of Tourism in Shropshire

As a visitor destination Shropshire has struggled for many years with its presentation model: is Shropshire itself a visitor-defined tourism product or is it more effective to present the area through its leading destination brands i.e. Ludlow, Shrewsbury and the Ironbridge Gorge which have greater public brand recognition and in some cases greater marketing power? The combination of politics, changes in administrative and strategic frameworks plus previous regionalisation has influenced the performance of tourism in Shropshire over many years. As a result the County has not produced a formal Tourism Strategy since 2004, when all 'sub-regions' within the West Midlands were encouraged to by the former Regional Development Agency, Advantage West Midlands. Each sub-region was also encouraged to develop a Destination Management Partnership.

Since that date Shropshire and Telford have journeyed forward, until 2010 when, via the new Shropshire Unitary Council and the restructured Shropshire and Telford Tourism Strategy Board, a new model was developed. Now, visitor-defined areas (focused on the most readily recognised products above) within Shropshire and Telford became localised into Destination Development Partnerships (DDPs). This model is now accepted by Visit England under its new Destination Management Forum.

This was where the real business was most likely to get done at the level where operators felt most involved. Thus, Destination Shrewsbury, Shropshire Hills and Ludlow, and North Shropshire and Oswestry were formalised, with Ironbridge and Bridgnorth still a work in progress. This coalescence in the north of an area of two former district/borough councils retaining two separate tourism associations has a long history of mixed attitudes to partnerships. It is fair to say that the north east and the north west of the county, looking outwards in different directions have never been easy bed fellows. **The identity of the area with a more fragmented offer is its biggest challenge, along with its lower profile, compared with the other DDP areas. Together, this makes for a different kind of strategy and action plan, but with greater reward ahead.**

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[1] Making Tourism More Sustainable, World Tourism Organisation/United Nations Environment Programme, 2005

So in one decade, Shropshire and Telford has gone from having a tourism officer in each of five districts plus tourism officers at the county level, working with the RDA and a regional tourist board, to one Shropshire unitary council with just two full time tourism officers covering the whole county and a senior officer covering the whole of the cultural and visitor economy. Telford, having become unitary in 1998, has maintained its commitment to tourism, though with a revised remit and a greater focus on Business and Convention Tourism activity which it leads for the whole county.

The Tourism Strategy Board and Shropshire Council endorsed the following priorities for tourism in Shropshire:-

- Marketing, including making the most of the county's links with the heritage of the Olympics
- Business support including access to finance through a tourism grant scheme and other external funding
- Training and skills including marketing, social media and IT
- Research and intelligence to support the above
- Product development including new hotels and other high quality accommodation plus the new World Heritage Site at Pontcysyllte Aqueduct and Llangollen Canal, which is an opportunity to enhance tourism in the north of the county.

The Shropshire Council Visitor Economy Team of 2.5 officers provides support to the three Destination Development Partnerships and in particular the new strategies and their marketing plans, which are aimed to give real ownership at the local level.

Shrewsbury and Shropshire Hills and Ludlow completed their Visitor Economy Strategies in 2011 and they are very different documents and approaches, led by local situations and partnerships. NSO began the process in 2011 through various consultations and workshops led by the County Tourism Officer. Discussions also took place with the long standing Tourism Associations of North Shropshire and Oswestry Borderlands as to how could they work best through the new NSO DDP.

During the consultation and workshop periods in 2012, led by 360 Tourism Consulting, to develop this strategy , it emerged that quite a few participants felt rather confused about the organisation of tourism and either had not heard of the DDP or did not know its role. Considering all the changes described above, this is unsurprising. So, **a further purpose for this strategy is to set out clearly the roles and functions for the future 'who does what' across the sector**, enabling everyone to play their part without ambiguity.

1.03. North Shropshire and Oswestry Destination Development Partnership (DDP)

The concept and purpose of a DDP as originally set out is: together with the Shropshire and Telford Tourism Strategy Board, to be responsible for supporting the tourism sector and developing the tourism offer within the destinations. They have been deliberately chosen as the four main areas with which visitors identify; although this does not mean that they will always be marketed as such i.e. the names are organisational. It will be for the DDP to map out their responsibilities given the resources available to them. There is a small budget allocation to progress priority projects.

The role of the DDP is to act as a forum bringing together private and public sector partners to agree a plan and co-ordinate operational issues. They will provide co-ordination to maximise the use of scarce resources and work to improve the quality of their remitted area. There is no 'one size fits all' approach and each DDP should develop according to local circumstances. The DDP should aim to improve the co-ordination of tourism businesses, public sector assets and voluntary groups thus leading to a higher quality offer to visitors to the area and the generation of wealth. The following is the non-prescribed guidance for DDP activities:

- **Develop a Strategy/ Action Plan –** setting direction and priorities for the area
- **Information within the destination -** e.g. in print, map display boards and web-based; potentially work with providers to reduce overlap and improve distribution of such material
- **Working more closely with Visitor Information Centres -** the DDP could assist the VIC's to continue to deliver high quality service, and integrate with the DDP to ensure good communications
- **Influence external marketing -** the DDP should be able to influence the content and distribution of area marketing by bodies such as Shropshire Tourism, Visit England etc by a Marketing Sub-group
- **Provision of services and facilities -** the DDP can link operators and the key tourism infrastructure e.g car parks, public toilets, transport services, parks, rights of way etc., and use the Community Regeneration Officers at Shropshire Council resource
- **Learning and sharing best practice -** The DDP will communicate with the many partners in the destination and could encourage new products and packages with operators, and facilitate better networking, partnership and collaboration
- **Developing and maintaining Sense of Place -** visitors value greatly the particular attributes of a town and area, which make them unique and give them a particular character. The DDP can play an important role in maintaining the unique character of local towns, villages and landscapes
- **Research and Database –** the DDP will act as a conduit of information and will be helped to create a database containing the details of all tourism businesses and organisations within its destination.

Membership of the DDP is open to District Tourism Associations, town tourism and retail groups; Visitor Information Centres, sector-based tourism groups e.g. farm holidays, attractions groups; statutory bodies such as Councils and Town Councils, AONBs, Inland Waterways etc.; local National Trust and English Heritage properties, visitor attractions, accommodation providers, and event/festival organisations.

It is expected that meetings of the DDPs will be held 3 or 4 times a year and will be supported by officers. The DDP will have the opportunity to bid for external funding in its own right to further its objectives.

The *Growth Plan for Tourism* across the Marches Local Economic Partnership area (Shropshire, Telford and Wrekin and Herefordshire) will depend on an effective visitor economy to provide the 3% growth target. A range of new research commissioned by the TSB is now becoming available for all DDPs.[2] It is important that the DDP aims to support these priorities for growth.

1.04. Decisions, Decisions: The Visitor Journey

Whilst the above focuses on the organisational structure, it must not be forgotten that without the visitor, there would be no visitor economy. Turning the focus around, the consumer underpins all the activities that follow within this strategy. Tourism has been on the NSO agenda for many years,

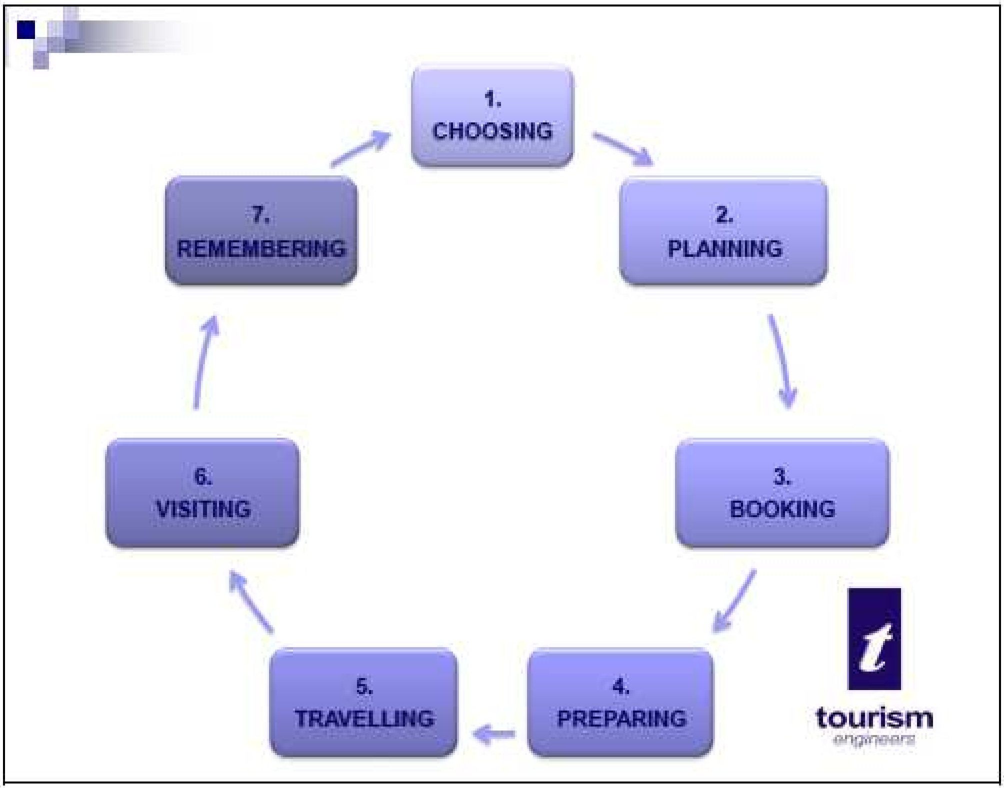
[2] E.g. Market segmentation by Arkenford, Hotel Study by Bridget Baker, economic impact etc

through various strategies and action plans at different levels. It is fair to say that the thinking through of the 'Visitor Journey' and the implications of getting it wrong as well as right, has not been centre stage in Shropshire as a whole, let alone in sub-destinations. The AWM-funded *Market Towns Better Welcome* programme started to make the thinking happen. The visitor journey needs to be the starting point for any meaningful strategy and action plan and has formed a part of the central thinking behind this strategy's ethos.

The **'Visitor Journey'** destination management model helps everyone understand the stages that we all take in planning and taking a trip, and the different actions, businesses and types of information that are involved at the varying stages. The visitor journey model sets the importance that consumers place on different sources of support and information at different stages – pre, during and post-arrival. The model traces the behaviour of visitors from the point at which they first **make the decision** to visit the destination, **plan, book,** pack, **travel** there, **experience, reminisce** and **recommend to others** and **return** (hopefully). In other words, it puts the customer at the heart of the journey.

The process sets out how and when different businesses and activities can influence visitors at appropriate stages within their journey - particularly **before** they get here and **whilst** they are in the area. The rapid changes in new technology means the online world and even just one individual can damn or delight a destination with one click of the mouse or a 140 character Twitter statement. The Visitor Journey is no longer a private affair, and nor is it in the past – but instantly in the here and now. 50% of UK retired are regularly using social media, with the UK having the highest use of mobile smart phones at 17.5million monthly users compared to just 4million in Spain.

The Visitor Journey model:



(Source: Tourism Engineers)

The context for this North Shropshire and Oswestry strategy therefore starts with the visitor and not the provider. The industry provider, whether private or public sector, has to think first and foremost of the customer, potential and actual, from the moment the business is 'visible' to the customer whether online or offline, whether on the telephone speaking personally or on message mode, to the moment that customer finishes their interaction, which is never as soon as one may think.

Quite a lot is known about the past, current and potential visitor to Shropshire and about the kinds of products that appeal to them. In an ideal world the visitor journey should be seamless, positive and painless. Some aspects of it may be out of the control of the destination, some might be due to all kinds of external factors but those that are under the control of the destination partners, across the public realm and the private sector, should be provided with good heart, with genuine quality and courtesy, offering not only value for money but also value for time. Only then can NSO dare to look at Trip Advisor with confidence!

SECTION 2: NATIONAL STRATEGIC CONTEXT

2.01. The Importance of Tourism in the UK

Britain is one of the world's leading visitor destinations; tourism is in fact its 5th biggest industry. Visitors contribute significantly to economic and social wellbeing. The English visitor economy is now worth £97bn a year and employs in excess of two million people[3]. In 2010 there were:

- 95.5 million domestic overnight trips in England, generating a total spend of £16.4bn
- 27.3 million inbound visits, together accounting for £14.3bn in expenditure
- 872 million tourism daytrips, with estimated spending of £39bn.

The large volumes of day visitors should be noted, spending less per head and with greater impact into the environment than those who stay overnight. In 2009 domestic tourism achieved its best performance this decade, following a difficult year in 2008 affected by the economic recession. The increase in 2009 was due to a rise in demand for domestic holiday trips during the year as people took holidays closer to home, which continued in 2010. However, value has not grown as much with holidaymakers spending less and taking advantage of many discount offers and late booking rates.

Employment generated is far higher than from other sectors such as farming, and the visitor economy supports employment directly across attractions, accommodation, catering and hospitality as well as in retail, transport and petrol filling stations, etc. Tourism provides routes into employment at all levels and is fertile ground for entrepreneurs. With continued growth, tourism is regarded as one of the few industries that will create new employment opportunities.

VisitEngland, the national tourism agency, sets out an aim to seek an ambitious **5%** growth in value, year on year, over the next decade. The **VisitEngland Vision** is to 'maximise tourism's contribution to the economy, employment and quality of life in England.' To achieve this, the key objectives are:

- To increase England's share of global visitor markets
- To offer compelling destinations of distinction
- To champion a successful, thriving tourism industry
- To facilitate greater engagement between the visitor and the experience.

At national level, a collaborative England Marketing Plan is in place which builds on best practice to get the highest returns for England from public and private investment. This focuses on a strategy of 'attract and disperse' – using England's long established and world famous 'attract' brands such as London, the Lake District and the Cotswolds and exceptional cities and towns alongside well-known themes, such as walking, heritage and sport, to attract visitors and encourage them to travel and spend more widely in the country.

Shropshire is not seen as a lead marketing brand, although Ironbridge Gorge World Heritage Site is the only attractor brand west of Birmingham in VisitEngland's brand map. The county clearly has a role to play in contributing to this national agenda, whilst recognising local views about the need for sensitive ways that any strategic growth may be achieved in relation to the environment and communities.

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[3] Strategic Framework for Tourism in England, VisitEngland, 2010

2.02. The Strategic Framework – Rural Tourism Growth

Rural recreation – including local leisure and tourism - contributed £17bn to the national economy in 2010/11 with nearly 2.5 billion visits made to English countryside, coast and open spaces[4]. Over half those surveyed visited the countryside or natural environment at least once a week. Within these figures, the number of visits taken to farmland, mountain, hill, moorland and woodland increased.

The number of holiday trips to the English countryside is increasing and is highly time specific. Around 70% of visits to the countryside take place in spring and summer. This is a much higher focus on these two seasons for countryside trips, compared to only 52% of visits being made in these seasons to all destinations (including coast and major city). Thus autumn and winter off-peak seasons are quieter, which affect business viability and employment opportunities. For many visitors coming from urban homes, the rural environment is 'an escape' associated with recreation, tranquillity and nature. Not for nothing is the TV programme '*Escape to the Country*' so popular or '*Rural Retreats'* and '*Rural Escape'* names of holiday companies. Other reasons for visits can include heritage, food, culture and community. Local food is an opportunity, providing benefits for producers, shops and restaurants/cafés. The local distinctiveness of an area, the 'sense of place' is a key driver for many visits – the reason can be for the landscape, heritage, food, or events/traditions specific to that location.

In response to the national headline for growth, VisitEngland has published a series of Action Plans, including the **Rural Tourism Action Plan 2010**. This has a specific rural Vision; '*To maximise the potential of the rural tourism offer, which will bring substantial benefits to local economies and communities and contribute to 5% growth, year on year, in the England tourism market by 2020.'*

And its objectives are:

- To diversify and modernise rural tourism products to generate business opportunities suited to local environments and communities and to develop a year round visitor offer
- To increase consumer awareness, understanding and enjoyment of the products and experiences available in rural areas, using advertising to reach a wider audience
- To encourage rural communities to benefit from the value of rural tourism by taking ownership for the development, management, protection and conservation of rural assets.

Many of the consultations across the NSO area reflected these nationally recognised topics, suggesting that there is a positive way forward that can be set out in the local area. Rural tourism creates opportunities for business growth and employment in areas where there is often a shortage of other opportunities. Also, it can provide opportunities for diversification and increased trade for local businesses. The **Defra Rural Economy Growth Review** and the local **Marches LEP Growth Plan for Tourism** also reflect the particular opportunities for rural communities to grow the visitor economy in ways that not only create wealth in the local area but which also invigorate business networking, joint activity and reduce duplication of effort.

2.03. Heritage Tourism

In 2010 VisitBritain (the national tourism agency) and the Heritage Lottery Fund collaborated in a major piece of research to establish the value and volume of heritage-based tourism in the UK with some surprising results. Heritage tourism was bigger than the advertising, film or car manufacturing industries in the UK. Its social and educational outcomes are huge as are its contribution to

[4] Monitor of Engagement with Natural Environment, Natural England, Forestry Commission, Defra, 2011

regeneration and neighbourhood renewal and better quality of life for all. It is also a major driver for overseas markets:

- Over 10 million holiday trips are made by overseas visitors to the UK each year with 4 in 10 leisure visitors citing heritage as the primary motivation for their trip to the UK
- Heritage tourism is worth £12.4 billion p.a. This is not just at heritage sites themselves but also the broader spending within the visit, e.g. eating, drinking and staying overnight
- Of that spend, 60% comes from UK residents on day trips and UK holidays, thus domestic tourism is the main component of the spend overall
- Of the annual £12.4 billion spent, £7.3 billion is based on visits to built heritage attractions and museums, with the overall total also including visits to parks and the countryside
- The wages and profits earned by heritage attractions and associated tourism businesses, such as hotels, restaurants and shops - is estimated at £7.4 billion a year. With economic multiplier impacts - the spending and earnings by suppliers to tourism businesses - total GDP of heritage tourism is £20.6 billion p.a.

Again, this strand of visitor activity, visiting heritage locations, is important to the NSO area, and like countryside tourism, is a key part of the product strength. Thus heritage tourism and the appropriate markets will be considered at length within the strategy and action plans that follow.

2.04. Life and Society - What it means for today's Visitor Economy

It is vital to consider the range of factors influencing the visitor market and consumer behaviour. The visitor economy in 2012 has moved on since the 2001 national outbreak of Foot and Mouth Disease which caused widespread closure of the countryside and affected many businesses in the rural economy. This highlighted at national level the importance of the broad range of businesses that suffered from the temporary loss of visitors – from pubs and village shops to diversified farms, food producers and retail as well as rural attractions. Tourism benefited as a direct result from a greater awareness of the role of visitors supporting local communities and businesses, largely spearheaded by the emergence of the RDAs on the tourism scene. It was also clear that urban and rural areas were interdependent.

Major changes affecting the visitor economy have taken place over the past decade and can be expected to continue. NSO as a destination (and the businesses within it) must respond accordingly if they are to thrive. These include:

Lifestyle and economy

- Crisis in the economy – increased unemployment, especially for young people, more part time working and continuing low interest rates and annuities for older markets/retirees
- Continuing turbulence in the international economy for the foreseeable future
- Major cuts in funding to the public sector after a decade of public largesse with many areas resulting in nil growth or closure in public sector marketing/tourism budgets
- Fuel prices have increased and some markets have begun to reduce travel distance and frequency of trip taking – a destination now has to be worth the effort
- Growth in the 'pink pound' with increased targeting of gay tourism
- An ageing population continues to see a greater number of older people and fewer younger people. Older 'empty nesters', where the children have left home, are having to work for more years before retirement and for potentially lower pensions than a decade ago
- Conversely the 'grey pound' is strong and the '60 is the new 40' mantra appears to be bearing up in surveys measuring adventure holidays/hiking, 'old age' gap years etc.

- A growth in the localism agenda which along with changes to the planning system may bring greater opportunity for communities to differentiate themselves and their local area.

Leisure trends

- For some visitor markets, there is a conscious desire to get away from communication, switch off and be in splendid isolation
- The main holiday week/fortnight continues to decline, although recession years have seen a small boom in UK holidays, particularly in less expensive camping and self catering
- However, overseas long holiday taking and use of no-frill flights continues to grow although many of the low cost airlines are now belying their name
- Many UK rural destinations remain short break secondary holiday locations; holiday trips to the countryside increased 22% from 2006-2009. More trips involve outdoor leisure pursuits
- Increased expectation of quality and better than at home fit out of holiday accommodation; growth of boutique hotels, lodges with hot tubs and fully fitted kitchens in self catering units
- Greater environmental awareness, reducing carbon footprint and growth in markets seeking locally produced food and drink, products and crafts and authenticity in their experiences.

Mass communication

- Internet access has increased with faster coverage and greater access to mobile 3G smartphones, mobile devices, internet access on the move, hand held satnav GPS as well as in vehicles
- Thus areas where there is little or even no fast broadband connection or poor mobile networks are at major disadvantage, an issue across much of Shropshire and now the subject of a new campaign by the Council
- More and instant trip research and bookings, peer reviews and social media are driving later as well as advance booking, and mobile payments is now in major growth phase
- Statistics in March 2012 showed that 72 hours of video worldwide are being uploaded to YouTube every minute
- There are 17.3 million mobile internet users in UK (aka smart phones). Over half the UK population has a smartphone (53% in 2012)
- In 2011 85% of UK households had internet access and 70% of UK adults went online daily
- Facebook now has over 31m UK registered users penetrating 52% of the population
- Around 140 million Tweets are sent **each day** in 2012. In 2010, there were a total of 25 billion tweets.

So, it is clear that the 'conversation' between providers and customers is wide open, whether the provision is for luxury, high end goods and services or for value for money products. The *Mr and Mrs Smith* boutique hotel brand at one end and a small rural bike-hire business at the other can both reach their target markets and 'talk' to them. The trick is how best to engage with these markets in ways that are effective and not costly. In the new technologically driven world of constant 'conversation' online, it is easier than ever to 'talk to' the customer direct.

2.05. Visit Britain Day Visits Survey – Insight into Key Market Segments

With around 88% of all tourism visits in England being made by domestic (i.e. UK resident) day visitors, it is important to understand them and respond to their needs even more effectively.

Insight is provided by Visit Britain[5] research into how day visitors (not overnight tourists who tend to have more research carried out into them) consider and take different types of day visit activity outside the home. Competition for day visits is strong. Activities in the home (e.g. watching TV, surfing online, reading etc.) take place a lot more frequently than activities out of the home. However, there is a diverse list of activities that more than 50% of the population undertake at least 3 or 4 times a year, including:

- Visiting tourist attractions
- Attending an entertainment (theatre/cinema etc.)
- Going for a general day out
- Going on a special shopping trip, and
- Pursuing hobbies, DIY and other 'leisure activities'.

'ArkLeisure' is a market segmentation technique used by the national tourism agencies, as well as many (former) regional and local development and tourism organisations. The ArkLeisure model was developed specifically for the leisure and tourism markets. It is based on individuals' values aspirations and lifestyle. It can predict their discretionary behaviour, like the holiday types they choose and the day trips or experiences that attract them. The ArkLeisure segments are differentiated from traditional socio-economic classification such as Experian's MOSAIC which is based on postcode and lifestage profiles. The different ArkLeisure segments also show clear preferences as to what they expect from a day trip:

- S*tyle Hounds and Followers* want good shopping facilities.
- 'A bit of culture' features on the 'C*osmopolitans', Traditionals' and 'Functionals'* list of what they are interested in doing, along with something 'educational'.
- *Traditionals* also look for a nostalgic experience.
- *Discoverers* are especially interested in a new experience and want to be able to do lots of things.
- *Habituals* are very interested in peace and quiet and an attractive setting.

How often people are going on day trips and their overall opinion about day trips are influenced by age, income and ArkLeisure segments:

- *Style Hounds a*nd particularly the *Cosmopolitans* are the most active of all groups.
- *Cosmopolitans* show interest in every kind of day out and are generally up for all kinds of events and new experiences. They are twice as likely as most other groups to attend a special event. **As they are the highest income group they are also the most valuable visitors to attract.**
- *Functionals and Habituals* will be the most difficult to persuade of the benefits of day trips. Fortunately these are smaller and less valuable groups.
- *High Streets* (and to a lesser extent *Followers)* are neutral in their opinions of day trips. These are the most persuadable groups. However they are also difficult to motivate, therefore they need easy things to do whose benefits can be immediately seen.

The type of day visitor attraction experience that the segments most frequently take part in across the country varies noticeably. By far the greatest level of frequent visits are made to historic houses/castles (by 27%) and National Trust properties (26%). History museums and art galleries are frequently visited by around 17-18% of all day visitors. Looking at history museums, science

[5] Visit Britain Day Visits Survey, Arkenford, 2008

museums, art galleries, modern art and transport museums - again the bulk of visits come from *Cosmopolitans* and *High Streets,* half or more of all day trips.

In the following table some insight is provided into the types of favoured attractions by segments of day visitor. The table should be read horizontally row by row to understand the segmentation pattern.

Table 1: UK Types of Attraction Visited 3+ times a year by ArkLeisure Segmentation Day Visitor

Attraction type – All GB Day visitors	All	Style Hound	Cosmo-politans	High Street	Disco-verers	Follow-ers	Tradit-ionals	Funct-ionals	Habit-uals
Historic Sites and Castles	27%	8%	29%	19%	12%	7%	12%	8%	3%
National Trust Property/Gardens	26%	6%	28%	20%	12%	9%	13%	9%	4%
Cathedrals/ Churches/ Abbeys	23%	6%	29%	21%	10%	6%	14%	9%	4%
Stately Homes and Palaces	18%	7%	30%	20%	11%	8%	13%	8%	4%
History Museums	18%	7%	31%	19%	11%	7%	12%	10%	2%
Art Collections and Galleries	17%	6%	36%	19%	10%	5%	13%	10%	2%
Science Museums	12%	10%	31%	21%	13%	7%	8%	7%	4%
Modern and Contemporary Art	11%	8%	36%	20%	11%	5%	10%	8%	2%
Family Leisure/ Theme Parks	11%	20%	28%	20%	13%	10%	4%	3%	2%
Transport Museums	9%	8%	30%	20%	9%	9%	8%	8%	7%
Average %age		**10%**	**30%**	**20%**	**11%**	**8%**	**10%**	**7%**	**3%**

Change and evolution will continue to take place, nowhere stands still. The businesses and communities of Shropshire and its different areas will evolve at a differing pace. Visitors will continue to come, pass through, stay and experience this area. This strategy for the visitor economy sets out an approach that should ‘future proof’ its businesses and natural assets for maximum benefit to all.

SECTION THREE: NSO PRODUCT AND PERFORMANCE REVIEW

3.01. Introduction

The Shropshire leisure visitor offer has centred for many years on its essentially rural character and the main attractors of Ludlow, Shrewsbury, the Shropshire Hills and Ironbridge Gorge. The overall essence of the county offer is rural heritage, market towns with some surprisingly large attractions mainly in the south of the county.

3.02. Economic Impact of Tourism to the North Shropshire and Oswestry area

In 2005, the last year for which sub-county (i.e. previous district-based) area visitor performance data was available:

- 2.2 million visitors came to the NSO area, mainly as 2.0m day visitors (91%) and 0.2m (9%) overnighters
- They spent 1.0m nights in the area
- In total £115m was spent in the area by all visitors; £73m (63%) by day visitors and £42m (37%) by overnight visitors
- In comparison, the visitor activity across the southern area of the county is twice the size, with 4.2 million visitors spending 2.1 million nights and £205 million into the local economy

Table2: Tourism Economic Impact at Local Area Level, by volume and value, 2005

	Trips (million)			**Nights (million)**	**Spend (million£)**		
	All	**Day**	**Overnight**	**All**	**All**	**Day**	**Overnight**
Shropshire and Wrekin TOTAL	10.60	9.30	1.30	5.60	561	345.2	215.6
Northern	2.20	2.00	0.20	1.00	115	72.9	41.7
Shrewsbury	2.60	2.30	0.30	1.40	137	88.3	48.6
Southern	4.20	3.70	0.40	2.10	205	13.0	73.7
Wrekin	1.50	1.20	0.30	1.00	104	52.0	52.0

Source: Shropshire Tourism Research/The Research Solution
'Northern' = former Oswestry and North Shropshire local authorities, 'Southern' = former Bridgnorth and South Shropshire local authorities (2 DDP areas)

In summary:

- NSO has around one fifth of all trips (21%) and spend (20%) of tourists to the whole of Shropshire and Wrekin
- There is a slight 'under-performance' in the overnight segment – with less share of the Shropshire/Telford and Wrekin overnight trips (only 16%) and less overnight expenditure (19%) in the NSO area
- This is a reflection of Wrekin local authority area having an above average amount and share of overnights and spend, due to its having the larger hotels and business conference venues as well as the Ironbridge Gorge World Heritage Site and a slightly larger urban population generating more trips to stay with friends and relatives.

Table3: Tourism Economic Impact at Local Area Level by percentage, 2005

	Trips (million)			Nights (million)	Spend (million£)		
	All	Day	Overnight	All	All	Day	Overnight
Shropshire and Wrekin TOTAL	10.60m	9.30m	1.30m	5.60m	£561m	£345.2m	£215.6m
Northern	21%	22%	16%	18%	20%	21%	19%
Shrewsbury	25%	25%	25%	25%	24%	26%	23%
Southern	40%	40%	34%	38%	37%	38%	34%
Wrekin	14%	13%	25%	18%	19%	15%	24%
Total	100%	100%	100%	100%	100%	100%	100%

Source: Shropshire Tourism Research/The Research Solution
'Northern' = former Oswestry and North Shropshire local authorities, 'Southern' = former Bridgnorth and South Shropshire local authorities

In terms of employment generated by the visitor activity and spend, around 2,855 jobs are supported by the visitor spend in the area. The employment supported is around 18% of that of the whole area of Shropshire and Wrekin – again suggesting that the under-performance in visitor expenditure has the knock-on effect of supporting fewer jobs.

Table 4: Tourism Economic Impact Employment Supported, 2005

Shropshire and Wrekin TOTAL	**15,691**	**100%**
Northern	**2,855**	**18%**
Shrewsbury	**3,593**	**23%**
Southern	**5,838**	**37%**
Wrekin	**3,629**	**22%**
Total	**15,691**	**100%**

Source: Shropshire Tourism Research/The Research Solution
'Northern' = former Oswestry and North Shropshire local authorities, 'Southern' = former Bridgnorth and South Shropshire local authorities

3.03. Visitor Numbers to Attractions

Visitor attraction figures for the North Shropshire and Oswestry area are not entirely clear. Not all attractions publish their figures. The surrounding area around the NSO borders has more attractions providing data. Overall, the NSO area appears to have modestly visited attractions, apart from Park Hall Countryside Experience. Without doubt, the nearby Welsh canal, National Trust and Ironbridge based locations are by far the largest generators of visits.

Table 5: Attraction Visitor Numbers (as published 2010/or 2009)

Attractions within North Shropshire/ Oswestry boundaries	
Park Hall Countryside Experience	55,000
Hawkstone Park and Follies	Not known
Wollerton Old Hall Gardens	Not known
Whitchurch Heritage and Visitor Information Centre	7,793
Whittington Castle	Not known
Cambrian Heritage Railway Museum	6,500
Hawkstone Hall and Gardens (nb; only open in August and not to be confused with Hawkstone Follies)	658
Attractions outside but close to North Shropshire/ Oswestry county boundaries	
Pontcysyllte Aqueduct (15,000 boat movements)	200,000
Chirk Castle, National Trust, Chirk	117,108
Powis Castle and Garden, National Trust, Welshpool	107,563
Erddig, National Trust, near Wrexham	141,470
Ty Mawr Country Park, Chirk	46,256
Dorothy Clive Garden	28,880
Wrexham County Borough Museum, Wrexham	15,057
Bersham Heritage Centre, Wrexham	9,087
Attingham Park, Shrewsbury	277,428
Cardingmill Valley, Church Stretton	c250.000
Blists Hill Victorian Town, Ironbridge	236,024
Ironbridge Gorge Museums Trust (overall figures including Blists Hill)	545,000
Weston Park	250,000
Llangollen Steam Railway	121,996
Anderton Boat Lift Trips	116,000
Little Moreton Hall, Cheshire	66,647
Stokesay Castle, Craven Arms	39,218
Gladstone Pottery Museum, Stoke-on-Trent	37,859
Wroxeter Roman City	20,690
Rays Farm Country Matters, Bridgnorth	19,000
Much Wenlock Priory	16,293
Llangollen Motor Museum	5,241

Sources: Visits to Tourist Attractions in Wales, Visits to Tourist Attractions in England, VisitBritain, 2010

3.04 Accessibility and Transport

Despite its highly rural nature, the area is situated in a fairly well connected location – surrounded in an arc to the north and east by Merseyside, Manchester, Stoke-on-Trent, Wolverhampton and Birmingham as major population centres. The road and rail links in particular are good:

Road

- In the west, the A483 and A5 provide connections along the Welsh borders – from Mid Wales, Shrewsbury and the Midlands and up through dual carriageways to Chester, North Wales and Merseyside

- In the east the A41 and A53 bring the area into easy reach of Crewe, Chester, the Potteries and the West Midlands conurbation and motorway network, with fast road access.

Rail

- The direct train service that runs through the centre of NSO links Manchester via Crewe with Shrewsbury and across to Birmingham or down to Hereford and Cardiff. The small towns of Whitchurch and Wem and the request stops at Yorton and Prees bring this connection into the heart of the area

- On the western side, the direct lines from Cardiff and Birmingham pass through Shrewsbury to Wrexham and Chester, connecting Gobowen to the wider world.

Public Bus

- The range of public bus services into and around the NSO area is varied, and as with other rural destinations, suffers from decreasing connections and frequencies of service. It is possible to get into and to an extent *around* the local area, most services following the key trunk road routes linking the main market towns with the larger towns/ cities beyond

- Moving east and west across the local area is relatively difficult, as most routes follow broad north south lines, with a lot of focus on Shrewsbury, as county town and anchor point.

Canals

- The *Shropshire Union Canal* built by Thomas Telford, whose workyard can still be found at Ellesmere, passes along the eastern edge of the North Shropshire and Oswestry area, providing links to the North West and West Midlands conurbations, with the marina and wharf at Market Drayton providing a hub of activity

- The *Llangollen Canal* stretches from the Shropshire Union near Nantwich and winds its way past Whitchurch, Ellesmere and on towards Chirk. A welcome planning application for a short extension to the canal arm and new marina at Whitchurch has recently been submitted

- One of the busiest stretches in the country for boat movements, the connection with the Pontcysyllte and Chirk Aqueducts and recently designated World Heritage Sites make this a ‘must do’ section of canal

- The *Montgomery Canal* is being reborn as a cruiseway with phased restoration from Welsh Frankton, ultimately heading back towards Newtown in mid Wales.

Walking

- *Offa’s Dyke National Trail* is the main north-south route along the more upland western side of the area, passing Chirk, Oswestry and Llanymynech before heading out into Wales. It is soon to have some changes to the route and be diverted to benefit Oswestry by going closer to some of its heritage attractions, including Llanymynech and Old Oswestry Hillfort

- The 140-mile *Shropshire Way* meets the Sandstone Trail, the Marches, Maelor and South Cheshire Ways at Grindley Brook in the north of the county, then runs south through Whitchurch to Wem and connects onto Shrewsbury and down to the well walked Shropshire Hills. The Way is being extended to allow walkers to explore the north west of the county

- The *Shropshire Way Oswestry Loop* is the first section completed (May 2012) of the Shropshire Way in the north west of the county, taking walkers from Llanymynech to Chirk Bank, onto Ellesmere and back to Llanymynech, and features both hilly and level terrain

- Linking to the Oswestry Loop there will be links into the canal towpath and across the meres and mosses to Whitchurch, due to be launched later in 2012. The Meres and Mosses Landscape Partnership Scheme (Heritage Lottery Fund backed) will also be developing more routes over the next five years. Other development work will improve the walking links between all the market towns in the North Shropshire area as well as others in Shropshire

- A multitude of print and online downloadable trail routes, leaflets and circular walks are available. Dedicated County and tourism walking websites coordinated by the public sector and commercial companies produce resources, including www.shropshirewalking.co.uk, www.shropshiretourism.co.uk/walking and www.byways-breaks.co.uk. Other holiday companies include *Secret Hills Walking Holiday*s (based in Shropshire), *InnTravel*, *HF Holidays and Ramblers*, and *Byways Holiday Tours*, which have walking holidays but in South Shropshire (the latter's Shropshire walks are listed under Wales)

- Walkers Are Welcome status is now established for Oswestry and Whitchurch, (the latter is being launched in August). The Shropshire walking website does not include these Walkers are Welcome links, or up to date information about walking festivals.

Cycling

- Across the north of the area, the *National Route 45: The Mercian Way* (from the West Midlands to Chester) links the Shrewsbury to Whitchurch section (30 miles), passing through Whitchurch, Prees and Shawbury

- *National Cycle Routes 81* links *Shrewsbury to Welshpool*, brushing along the southern edge of the NSO area, linking outwards to Aberystwyth and Wolverhampton

- *Regional Route 31: Oswestry – Whitchurch* connects Oswestry, Ellesmere and Whitchurch and links with National Route 45 at Welsh End (near Whitchurch)

- *Regional Route 75* is open between *Nantwich, Market Drayton and* Newport. It follows the Shropshire Union Canal through picturesque countryside, quaint villages and market towns

- Route guides are on Shropshire Council's website www.shropshire.gov.uk/cycling.nsf and www.shropshirecycling.co.uk/. The Council also produces a series of leaflets of local circular Cycle Rides around each of the five towns of Market Drayton, Wem, Ellesmere, Whitchurch and Oswestry.

Disability access

The North Shropshire and Oswestry area has been well researched and tested in practice by the specialist group www.disabledholidayinfo.org.uk, coincidentally based in the area. Their website and four publications for Shropshire (transport, activities, tourist attractions and accommodation, countryside) provide extensive information for this market. It offers considerable depth of activities and advice for visitors with specific needs to be able to view the NSO area as a good place to visit and take part in activities, particularly in the flatter parts of the Cheshire Plain but also elsewhere, both sporting and cultural. Their online advice extends to neighbouring counties and to all aspects of the visitor journey with specific and detailed advice and photographs about how best and where to eat, stay and visit. However, budget and income pressures are putting the production of any updates on the back-burner. Visiting the market towns is also catered for with specific recommendations eg. www.access-oswestry.org.uk. Similarly full coverage of the Whitchurch and surrounding area, ensures that the whole NSO area is extremely inviting for these markets and also broadly provides useful information for anyone with mobility issues, including families with young children in buggies and/or mixed ability groups.

3.05 Product Overview – The Big Themes

Throughout the review and consultation process a number of 'lead' product types - **Big Themes –** have been identified and critically appraised and prioritised during DDP workshops in 2011-12, with various partners and local businesses. The themes tend to fall into two categories; primary-dominant and secondary-supporting, based upon the range of key products, locations and amenities across the area.

Table 6: Big Product Themes

Primary Product Themes	***Secondary Product Themes***
• Landscapes	• Events and Festivals
• Canals and Meres	• Specialist niche products
• Market towns	• Food and Drink
• Gardens and gardening	• Golf /spa
• Heritage	• Cycling and specialist sport activity
• Walking	• Business/conference

The following sections briefly set these out, with an initial constructive review of their strengths and weaknesses. Section 6 will develop recommendations and actions associated with thematic product development.

3.06 Primary Product Theme: Landscapes

Landscape includes canals, lakes and meres, rivers, types of land use, forests, woodlands, heaths, mosses, hills, plains, farming and all the flora and fauna within. There are also archaeological remains **in** the landscape – Old Oswestry Hillfort, Offa's Dyke itself, Oswestry Racecourse etc. which are also **heritage** features. Recent research shows that waterside environments have strong visitor appeal. NSO has small rivers, the emergence of the upper Severn, canals and glacial meres.

There are landscape features and assets which could stand out from the crowd rather more than they currently appear to. These can be linked to the sandstone ridges of the areas around Hawkstone and its amazing Follies, the Shropshire/Cheshire plain and the rising ground which meets Wales on its northwest borders.

Not many counties in England can boast the opportunity to glimpse the 'biggest spider in the country' or the carnivorous sundew (the official 'flower of Shropshire') which can be seen in the northern Shropshire Mosses, 'the most varieties of moss' in the country, and the first theme park (Hawkstone Follies) – planned in the eighteenth century. In addition, North Shropshire has a set of unique remains in the landscape dating from World War II: its airfields heritage - including the surprising fact that Bob Marley's father was stationed here.

3.07. Primary Product Theme: Canals and Meres

Canals are obviously a strong product across much of the area, and have the benefit of providing connections, quite literally, between market towns, and out to the surrounding conurbations. Running east-west through the area, and along the eastern side, the canals, wharfs, lock flights and marinas provide places of activity between the long quiet rural stretches. It is important to remember that for many visitors it is the landside of canals that is important – what you can do along and at the side of them. Canals also fall into the (industrial) **Heritage** category, but in a 'soft' seemingly more natural way.

The canals may not be as strongly associated with Shropshire in general in consumers' minds as other counties, like Staffordshire, despite having one eponymously named – the Shropshire Union. Tyrley Locks near Market Drayton, Grindley Brook at Whitchurch and other sites have good visual appeal. The Montgomery Canal in the centre of Ellesmere is also very attractive and it is proposed to extend the navigable length which will attract new visitors. However, in an area with many outlying target market areas (Birmingham, Manchester, Merseyside, etc) already having good canal access it is vital to identify the main locations/activities where visitors can 'consume' the canals and do so differently from on their urban doorstep. NSO canals do not have the big 'must visits' that Warwickshire, Staffordshire and Cheshire offer – tunnels, junctions, lifts, lock rises, big basins etc. However, Pontcysyllte, the World Heritage Site now offers the 'must do' aqueduct trip and the big 'must see'.

It is important therefore that the marinas and town locations come to life and are seen as **somewhere always worth visiting.** Whitchurch may have this opportunity in the future. There is a need to flag up the further opportunities for other activities – eg canoeing, angling, tow path walks, cycling towpath routes, views for painting, photography, children to do things, heritage aspects, good pubs and/or tea rooms/retail etc.

Shropshire Wildlife Trust's *Meres and Mosses* landscape, habitats and species-based project will strengthen the asset and the interpretation of its importance to the public. However, at present the Trust recognises that the dispersed wetlands, apart from large existing public sites such as Ellesmere and Colemere, are not yet ready for significant promotion as visitor destinations. One of its first actions is to create a brand for the Meres and Mosses and it will be very important for NSO to work with this.

3.08. Primary Product Theme: Market Towns

A key asset across the area are the five market towns, offering havens of heritage, retail, hospitality, arts and cultural experiences to the visitor. From east to west; Market Drayton, Whitchurch, Wem, Ellesmere and Oswestry fulfil their centuries old tradition as local service centres. All retain differing levels of historic streetscape and buildings, with remains of castles and market places, as well as connections to meres, canals and former rail networks and industries such as brewing.

Two major characteristics that are perhaps taken for granted and obvious to those living locally, but which should not be overlooked in terms of the key visitor markets are:

- The fact that the town centres are centuries old, varied in their fabric (black and white timber, stone and red brick) and compact - notably very different to the places where the majority of day and overnight visitors come from (being large urban conurbations, Victorian growth towns, 20th century suburban estates, etc.)
- They are not 'clone towns'. There are relatively few high street chain stores; except in Oswestry, the second largest town in Shropshire and a far larger town than Wem or Ellesmere. All have very high levels of independent businesses – whether retail, food and drink providers, accommodation establishments etc, and many still with regular street or covered markets.

In many cases, the economic impact of the visitor economy in the North Shropshire area is greatest within the market towns – achieved through spend on shopping and eating/drinking, as well as to see places, events and attractions. This supports numerous local jobs. The intertwined relationship in such market towns between residents spending and visitor spend is much more crucial than in urban areas.

The specialist independent retailer attracts and creates far more than simply a customer, e.g. in NSO there are specialist suppliers for such sectors as shooting, gun repairs or equestrianism who attract consumers willing to travel a great distance to obtain what they need, creating spend in fuel, food and drink and accommodation. Other specialists such as photography, crafts or new food and drink businesses will also draw new audiences. Such specialists can give weight and identity to a destination if they are sufficiently well known and promoted as part of raising the reputation of the market towns.

3.09. Primary Product Theme: Gardens and Gardening

There are sufficient gardens (and garden centres) in close proximity to make the whole area of North Shropshire very worthwhile for **garden tourism.** Within the area or immediately adjacent lie; Dorothy Clive, Wollerton Old Hall, Hawkstone Park, and Hawkstone Hall (open to public half of August annually), (Hodnet Hall unfortunately is no longer open on a regular basis), Bridgemere, Cholmondeley, Moreton Hall Nursery, Hadnall Garden Centre, Hall Farm Nursery, Heathwood Nurseries, Nescliffe Country Park, Mereside gardens walk at Ellesmere, Oswestry's own municipal Cae Glas Park Gardens and Combermere Abbey (famous for its bluebells and snowdrop walks and fruit tree maze – the only one in the world)..

The garden offer is even stronger when augmented with the National Garden Scheme (NGS) and Open Gardens (12 in NSO area including Hodnet and many more in Llangollen and NE Wales). Also the major gardens in nearby National Trust properties already aligned with local marketing, e.g. Powis Castle, Chirk Castle, and Erdigg. Cheshire's long established and comparatively well funded *Gardens Of Distinction* campaign generates cross-border marketing opportunities. On this basis, then NSO is a very good base from which to visit them. The **market towns** are also high on *Britain in Bloom* regular winners' lists. Nearby links could extend to Attingham Park, Shrewsbury/ Quarry, Percy Thrower and the Shrewsbury Flower Show.

In addition, both Wollerton Old Hall Gardens and Dorothy Clive Gardens are recognised Royal Horticultural Society (RHS) Partner Gardens – giving them considerable status and thus able to target specific markets. There is also Wem and the origins and development of sweet peas and the annual Sweet Pea festival (Henry Eckford). Market Drayton was also famous for damsons and gingerbread.

William Emes was an 18^{th} century landscape gardener comparable, although less well known, to Lancelot 'Capability' Brown. He landscaped many gardens in the N Wales/N Shropshire area – not all are open to the public, some are National Trust and some are private houses open under special arrangements for a few days a year. He worked on Hawkstone Park lake, Walcot Hall, Chirk Castle gardens, Erdigg, Keele Hall, Whitchurch Rectory, Aston Hall near Oswestry and Powis Castle. This gives us links in with the Clive of India story (born Market Drayton and lived in both these latter listed homes). Emes also worked on many other Shropshire and Cheshire gardens. He has a following and it might be feasible to create an Emes Landscape Garden Trail with some Heritage Lottery Fund grant support and partnering with an organisation like the Historic Houses Association.

3.10. Primary Product Theme: Heritage

Everywhere in the UK has 'heritage', so it is not a unique product; what is important is the distinctive heritage that stands out or characterises an area, whether built, industrial, natural, literary, artistic, etc. The problem here in NSO is to specify **what** heritage as the cross-over is immense and, as already noted, it permeates **Landscapes, Canals, Market towns and Gardens**. Whilst it is of course true generically that 'heritage' is enjoyed across many age groups and visitor types, it needs to be more specific for this purpose if it is to remain a 'big theme'. In reality, the destination is not perceived as a major 'must see' heritage location, but the heritage assets provide experiences once the visitor has made it into the area.

The World Heritage Site at Pontcysyllte already supports a 'big heritage theme' along with the canals. There is a balance to be struck between promoting the more obvious heritage sites (castles, historic properties, etc.) and not over-stating the industrial heritage of this area, which is not seen as core to the rural Shropshire experience. However, sites such as Pontcysyllte and Chirk aqueducts are very much industrial heritage products – but **are** being imaginatively presented and differentiated for market segments. We know that there are some overseas and domestic markets that assiduously visit all World Heritage Sites and National Trust sites and there will be merit in considering how best to reach those in a cost effective way.

So what does NSO also offer that still answers the challenge of being distinctive? There are castles and country houses. Although not all are in the county there are many again in the bordering areas - often National Trust with gardens (Chirk and Erddig), which creates a sizeable following in its own right. Whittington Castle is definitely outstanding visually and has great appeal – especially if linked to its events programme and the village open gardens scheme. Moreton Corbet (English Heritage) is attractive if only as a brief stop.

Indeed a whole short break/long weekend itinerary could easily be built around the cluster of heritage sites with Oswestry as a strong base. The above sites combined with the famous WHS aqueducts, adding Offa's Dyke walking and Old Oswestry Hillfort and Llanymynech Heritage Area or the Cambrian Railway for instance. Thus, heritage, easy landscapes and canals are all encompassing and without help the unknowing visitor could miss a great deal.

3.11. Primary Product Theme: Walking

National and regional walking routes have been listed (above 3.05). North west Shropshire has some strong product which benefits from Offa's Dyke National Trail path with developments and promotion. It offers a 'connoisseur's' alternative to the better known Shropshire Hills AONB and walking routes. The Oswestry northern loop of the Shropshire Way and Oswestry as a 'Walkers are Welcome' town mean that the volume of local walking activity here is growing. The town is also planning a walking festival, which is a good way to gain PR and engagement with new markets used to going to such festivals elsewhere.

By contrast, north east Shropshire is weaker on good walking routes and footpaths. The Oswestry Loop will link into the canal towpath and across the meres and mosses to Whitchurch. A link to Market Drayton is the next aspiration but there is no funding at present. It can be done in the longer term using existing rights of way and would properly complete the Shropshire Way including links to Whitchurch and Wellington.

Overall ease of access to rights of way is average across the north of Shropshire; there are some issues with farmers not cooperating over rights of way, especially around the Whitchurch area.

Walking guides, trails, leaflets and downloads are widely available from local libraries, Visitor Information Centres, online, bookshops etc. Shropshire Council promotes a number of Meres and Mosses trails and a county wide leaflet Best Foot Forward as well as the website www.shropshirewalking.co.uk .

3.12. Secondary Product Theme: Events and Festivals

Shropshire as a whole, including the NSO area, has an abundance of festivals and events throughout the year – mainly from spring to early autumn, with Halloween/Bonfire and Christmas special events at many attractions and towns. This encompasses a wide array; such as Food and Drink at Ellesmere and Oswestry, Festival of the Word at Oswestry, Normans at Whittington Castle, Moto-Cross at Hawkstone Park, Osfest at Oswestry Showground, etc. However, in general, apart from a couple of exceptions noted below, the scale of events tends to be modest compared to those held at the larger attractions that lie beyond the immediate northern area of the county.

A small number of events and venues indicate some substantial attendances at one day or weekend long events that encompass agriculture, sport, arts, heritage, vehicle and antiques. For example:

- Oswestry Showground holds a number of events year round, operated by both the Agricultural Society and by third party event organisers. Whilst total figures are not collated, it is realistic to estimate that perhaps 35,000+ people come onsite, many staying for a weekend, not just one day events:

- Oswestry Agricultural Show 15-20,000 one day
- Osfest concert 5,000 one weekend
- Shropshire Truck Show 3,000+ one weekend
- Clwyd Veteran Vintage Vehicle Society weekend
- Amulet Antique Fairs throughout the year
- Car Club rallies, horse, canine events, etc

- Oswestry's growing Food Festival attracts around 9-10,000 visitors over one weekend

- The Shropshire Triathlon held at Ellesmere using the mere and surrounding area attracts 850 competitors plus a similar number of supporters over one day at a weekend.

- By contrast, the popular Cholmondeley Pageant of Power, at Cholmondeley Castle just over the border into Cheshire now attracts over 50,000+ in one three day weekend.

Festivals can attract new audiences to places they wouldn't normally think of visiting, drawn in by entertainment more so than by the destination. Activity and animation as provided by events, whether within towns and villages, or at paying attractions, helps to generate interest in making a visit from those that may not have previously chosen to come to the location, and also helps create a reason to make repeat visits. Thus there is felt to be opportunity to make more of the sense of 'entertainment' and activity across the NSO area, which will be developed in the Action Plans later.

Sporting, niche and other events involving conferences or business specific topics can all help draw markets into an area. Golf and country pursuits are relevant to NSO. However, looking at events/festivals on the various websites showed mixed results in terms of quality and breadth of coverage, as well as the ease with which visitors navigate the various diaries/ what's on/ calendar listings. There are a lot of very good events and this is certainly an area where a lot of PR can be gained especially using social media.

3.13. Secondary Product Theme: Specialist Niche Products

In addition to the leading Primary Themes, a breadth of more detailed **smaller themes** with **potential or niche** appeal exists, including (but not a definitive list)**:**

- Literary figures – Wilfred Owen and writers such as Barbara Pym, Lorna Sage - tend to attract small but committed audiences
- Family attractions: Mythstories, Park Hall and Fordhall Farm crossing over to different markets including food and drink, family activities
- Angling/water based – canoeing, lake fisheries, etc. which can be across longer seasons
- Churches and trails around the area, with links to out of area mother churches, abbeys, etc.
- Wartime heritage; former airfields and military bases – a diminishing market, but genealogy interest to next generations, and major anniversaries including for WWI in 2014 and 2018
- Arts, sculpture trails, galleries, links to some festivals, provide connections across NSO
- Horse riding bridleways, and racing stables
- Heritage railways/industrial heritage and the 'heavier' more recent history of the area
- Disability/accessible routes, attractions and activities

Churches and disability/accessible tourism have lots of overlap with mainstream markets and these are probably more major priorities. Some niches are hard to influence locally, and anniversary links such as for WWI and WWII are particularly dependent upon outside national PR. Literary and other cultural niche markets are often tight in interest and promotion and investment takes an opportunistic approach such as being linked to forthcoming TV /film adaptations etc., rather than having high public focus all the time.

The Cambrian Heritage Railway operates from both its Oswestry station base and also from Llyncylys, five miles south west. The history of railways in Oswestry, sometimes claimed as the Swindon or Crewe of Shropshire in its day, due to the Victorian railway connections and the growth of the town itself, is fascinating and clearly has some support. It adds a dynamic attraction (though with limited operation days especially in Oswestry) and has obvious themed links for many visitors to the romanticised GWR and also to other 'soft' industrial heritage attractions such as the Pontcysyllte aqueduct WHS and other nearby heritage railways on and over the border in Wales.

The Railway Trust is clearly very professional and dedicated and has a good track record in obtaining public funding. However, to make the leap from a purely volunteer-operated attraction to a major tourism attraction, such as the Severn Valley Railway with 84 Full Time Equivalent staff or the heritage trains sector of upland Wales, is a significant challenge. The eight mile ride aspiration would, however, make a bigger impact if the link to the national mainline at Gobowen was delivered. It is clearly recognised by the Trust together with the substantial financial commitment in the future to infrastructure to make it work. The link with Gobowen and mainline rail would be massively beneficial to the whole area – both for business, residents and visitors alike. The solution now sits with the public sector at Council level to make this happen. The fuller rationale and analysis is in Appendix E.

3.14. Secondary Product Theme: Food and Drink

Food and drink supports the visit as a complementary and enjoyable activity, but on the whole is not a driver of trip taking. The northern Shropshire area is not famous like Ludlow for food, but it does not need to be 'high end', although there are some that fit into that category such as *Sebastians* in Oswestry. Generally, consumption is a supporting activity within a visit, not just eating and drinking out whilst exploring the towns, villages and attractions, but it could be at a festival or in a high street retailer or farm shop. There are a multitude of tea rooms, pubs and restaurants; the key is to encourage quality (within the target price range) and support of local producers and suppliers to provide a locally appetising experience.

There are a breadth of local 'food heroes' – farms, suppliers, drinks and delicatessen outlets that offer locally produced goods which appeal to visitors, although the area has limited special distinctive products. It is important to give the promotion to outlets and suppliers, to get more spend into local tourism businesses and support farm attractions like Fordhall, Park Hall, and farm shops. Expectation to be able to taste and buy locally sourced food and drink has increased massively in recent years. More work is needed with local businesses and food markets to establish the area as an authentic 'real' food destination and to give outlets greater promotional profile. This needs to be linked to retail markets and the Shropshire farmers' markets initiative.

3.15. Secondary Product Theme: Golf /spa

The Arkenford research into attitudes towards Shropshire showed that golf is not as high up on the list of activities that a 'likely' visitor to Shropshire wants to do – i.e. on the basis of 'this is my kind of place', in fact golf was way down. However, it still has a strong place that is important in the NSO area, driving both leisure trips and also the business visitor. The north of the county, and its cross-border neighbours, include a number of 18 hole parkland courses, 18 hole championship courses, 9 hole courses, driving ranges and, arrangements to make golfing holidays. www.shropshiregolf.com includes the leading venues, including Hawkstone Park, Henlle Park, Macdonald Hill Valley, as well as local courses at Mile End Oswestry and Market Drayton. There is an overall strong story across Shropshire as a whole with famous golfers from the county.

The specific hotels/golf courses in effect take the lead using existing golfing networks/web/magazines rather than tourism destination led approaches - and it cannot be ignored. It is clear that once the visitor is at the golf hotel (often a resort) every effort should be made by nearby towns and attractions to get these visitors to make local visits. There is the potential for guests to either stay on site, or only visit say Shrewsbury or Chester, missing out on actually being in the NSO area. Spouse activity can also be key to increased local spend, either by male or female guests.

Specific marketing is not just aimed at golf enthusiasts. The resort hotels, including Hawkstone Park and Macdonald Hill Valley offer leisure county club resorts, along with other non-golfing hotel venues including Lion Quays. The ‘relax and recharge’ message dominates the leisure promotion – unwind, use of quality facilities, wrapped up with good dining afterwards. These venues and leisure facilities tend to appeal towards higher spending customers, and can provide a quality image that resonates well with the area, and fits some of the key target market segments such as Cosmopolitans.

3.16. Secondary Product Theme: Cycling /other sporting activity

Cycling is a relatively small visitor market for the leisure segment across NSO, based mainly on use of quiet on-road and quiet lanes routes, as opposed to mountain bike markets which are well catered for in neighbouring Welsh upland areas. The generally low lying landscape, with only a few hills can be a good point of distinction for the area, for those seeking easier routes. However, there are few off road routes, apart from around some of the lakes and along canal towpaths – routes which can appeal to families with younger children.

The breadth of cycle routes and circular trails has been noted already and is a key strength for certain markets, particularly ‘novice’ and infrequent riders, families, and those taking opportunistic holiday hire trips. Whilst cycle routes are readily available for those seeking information - on websites and in cycle guides/ magazines, the area does not have a very well coordinated approach to supporting infrastructure, cycle hire shops, bike shops for repairs, etc.

As noted in the events section, there are a number of sporting recreation activities across the area that attract special interest participants as well as partners/ entourages, not just locals, but from around the country to take part. These include World Triathlon stages in the Shropshire Triathlon at Ellesmere, the Moto cross at Hawkstone Park, various equestrian events, including at Oswestry Showground, and on some of the larger country estates game shooting. Horse racing at Bangor on Dee also attracts a small market of day and overnight visitors from out of town.

3.17. Secondary Product Theme: Business/conference

Whilst the above themes have been based around the dominant leisure tourism activities, there is also an amount of business tourism activity across the NSO area, mainly linked to the larger higher quality graded hotels. There are various hotels with business led facilities, arguably overlooked by most due to the focus on leisure tourism. The larger hotels tend to be located on or close to the main trunk roads acting as business-centred venues of higher quality and facility grading. These are good large business/leisure resort hotels with business and corporate profiles, both as destination hotels, en route stopovers and located ‘mid way’ for executives to meet between city hubs.

Although there are relatively few large business employers in the north of the county, one of the most well known companies in Shropshire is Müller, whose TV advert for yoghurt arguably had a very positive effect at putting Shropshire and its rural attractiveness on the map. Businesses such as this have a high business profile and generate visitors from across Europe – but how many are encouraged to use their spare time to explore the area?

Other types of higher spending business/ corporate delegates making overnight stays include those linked to Oswestry's Orthopaedic Hospital (for training and conferences, as well as family of patients that may stay for a few days), as well as parents visiting their children at private educational boarding establishments. Improved tourism communication to these venues can enable their visitors for 'non-leisure' purposes to spend some of their time off discovering what is on their doorstep.

The main focus for Shropshire in promoting to the business and corporate market tends to be led by supporting the hotels predominantly around the Telford area, directed by the Meet Telford and Shropshire Convention Bureau. Only Hawkstone Park and MacDonald Hill Valley advertises through this route. Other specialised corporate venues include Hawkstone Hall retreat / conference centre, Oswestry Rugby Club / TNS Venue Football Club (which is upgrading facilities), Oswestry Showground and Walford and North Shropshire College.

3.18. Accommodation Establishments Review

There are approximately 60 businesses identified as providing accommodation of all types across NSO shown on the Shropshire Tourism website; this includes agencies for more than one self catering property. In reality there are more accommodation businesses, as this database only includes accredited inspected properties. Many non-graded smaller guest houses and inns particularly do not show up in the listing. Overall there is a spread of some medium to large hotels and caravan parks, but mainly small independent B&Bs:

- The Shropshire Tourism accommodation search shows:
    - 9 hotels and 20 B&Bs, guest houses, farms, inns, restaurants with rooms
    - 22 self catering and 5 caravan and camping
    - 1 narrow boats

- North Shropshire Tourism uses the Shropshire Tourism database and its accommodation is included in the above listing
- Oswestry Borderland Tourism has its own member and wider business database – which generates approximately 54 businesses – many already listed on Shropshire Tourism, but also others further into Wales and/or not accredited, and not included on the ST database
- Approximately a dozen additional businesses of all types are generated in the immediate Shropshire Borderlands/Oswestry area in addition to the 60 on the Shropshire Tourism database. A further half dozen lie out into Wales towards the Berwyn Hills and Llangollen
- The NSO area overall is quite light on 5 star Guest Accommodation/ Inns – it tends towards being 3-4 star
- Some small hotels/ inns exist in the market towns
- There are very few Silver and Gold quality excellence awards and Highly Recommended AA
- However, several of the AA ratings are high at 75%-87% (Goldstone Hall top)
- A good number of AA 2 rosette for dining at both hotels and inns
- A few larger resort/ spa hotels and a small number of country house hotels
- Not an obvious large amount of self catering, these tend to be 4 star
- But, a small amount of quality 5 star self catering properties
- More ungraded businesses are at least joining into the Shropshire Tourism Accommodation Assessment Scheme local grading inspection.

There is a key grouping of quality larger hotels, many as resorts/ spa/ golf centres:

• MacDonald Hill Valley Hotel Golf and Country Club	4 star, 80 rooms
• Hawkstone Park	3 star, 67 rooms
• Moreton Park Hotel	3 star, 45 rooms
• Lion Quays Hotel and Resort	4 star, 82 rooms
• Wynnstay Hotel and Spa Oswestry	4 star, 34 rooms

and on the fringes of the border area:

• Mercure Shrewsbury Albrighton Hall Hotel and Spa	4 star, 87 rooms
• Carden Park Hotel, Golf Resort and Spa	4 star, 196 rooms

There are also a notable range of country house and town centre boutique hotels, generally smaller with 3-4 star grades:

• Cross Lanes Best Western, towards Wrexham	16 rooms
• Pen-y-Dyffryn Country Hotel, Oswestry	12 rooms
• Goldstone Hall, Market Drayton	12 rooms
• Soulton Hall, Wem	7 rooms
• Sebastians (in Oswestry town) boutique dining	6 rooms
• Sweeney Hall Boutique Hotel and Restaurant , Morda	9 rooms
• Old Rectory Hotel, Wem	14 rooms
• Ternhill Hall Hotel, Market Drayton	13 bedrooms – under new owner/refurbishment – not graded
• Old Colehurst Manor, Ternhill	9 rooms, not graded

Self Catering

There seem relatively few self catering businesses across the whole area – 17 listed sites on Shropshire Tourism website supplying 33 units, generally 3-4 star graded, plus 5 caravan sites including some static home lets:

- A small number of Gold and Silver excellence and Highly Recommended AA
- But there is a small clutch across the patch of premier 5 star – both single cottage and larger luxury group houses (also a couple of 4 star Gold/ Silver), including:
    - Combermere Abbey, Whitchurch, 5 star Gold big events and weddings business
    - Brassey's (Malpas, S Cheshire) 5 star Gold
    - Bon Accueil, luxury group accommodation, Whitchurch 5 star Gold
    - Bryn Tanat Hall, Llansantffraid, luxury group accommodation, 5 star Gold
    - Brynallt Country Park, Welsh Frankton, 5 star Gold
    - Shropshire Holidays, Oswestry and Ellesmere, 5 star Gold

Cottages4U www.cottages4you.co.uk national website shows only a few properties across northern Shropshire – almost all 3-4 star:

- The Stables, Coach House, Tushingham, Whitchurch 2 units
- Offley Grove Farm, Adbaston, nr Cheswardine, 5 units
- Rhuewood, Wem, 1 unit
- Wood Far, Burlton, 2 units
- Old Forge, Knockin, 1 unit - (ignored, already listed on Shropshire Tourism)
- Windyridge Cottages, Alderton, 2 units
- Drury Lane Barn, Ty Broughton, nr. Whitchurch, 1 unit 5 star
- Old Bricket Annexe, Babbinswood, Oswestry, 1 unit
- Darlee Cottage, Ruyton XI Towns, 1 unit

These add a further 8 sites with 15 units to the Shropshire Tourism list.

Sykes Cottages, www.sykescottages.co.uk has a further 19 sites with 21 units to add to the Shropshire Tourism list, including four 5 tick exceptional properties.

In total then, the NSO area including Oswestry Borderlands (including some blurring into the immediate southern Cheshire, Welsh and Staffordshire borders) from these sources alone, actually has far more properties than is realised. There are around 50 self catering properties, providing 75 units, many appearing 'under the radar' due to promotional use of various agencies. Other self catering agencies are also bound to generate properties listed solely with them.

Camping/ Caravanning

- There are a few larger camp/caravan sites – and quality grades are varied at 3,4,5 AA pennant
- Fernwood Caravan Park, Manor Wood Country Caravan Park, Lower Lacon Caravan Park, Wharf Caravan Park, Camping and Caravanning Club Site, Oswestry, The Newnes Touring Caravan Park are the main sites, broadly centrally located across the area
- There appear to be gaps in larger caravan/camping park site provision in the west –Oswestry /A5 area, and east – Market Drayton area. This may be a possible opportunity for growth development in the future and farm diversification. Sites can attract hundreds of visitors per week, part of product diversification of existing business, not necessarily totally new development, and make the link to nearby market towns for access and retail.

3.19. Conclusions on Product and Performance

The review of the product and performance data has proven far reaching and complex. The analysis of products and the gaps in-between lead to some clear conclusions. These will be bolstered by the review of the key target markets and marketing activity as shown in the next section. By setting them out at this early stage it allows the subsequent recommended actions to link overtly to the key objectives of the strategy. Key initial conclusions to build on are:

- There is a broad product range – some high profile and high quality, but arguably much being good, pleasant but nothing that spectacularly jumps out – hence the existing lower profile of much of the NSO area
- What underpins the area is the outdoor experience and landscape of gentle lowlands, canals and wetlands, and the linkage with authentic market towns, suffering with the current economic belt tightening, but providing hubs for residents and visitors
- The identity of the area is not one that can be encapsulated by a single strapline about the product range such as can be done in other locations: e.g. along the lines of The Birthplace of the Industrial Revolution, The best beaches in the country, etc.
- The identity can however be articulated by explaining what the benefit is to those that visit and how they will feel when they do – the most classic form of marketing - appealing to personal aspirations and lifestyle and answering the eternal 'What's in it for me' question for all consumers
- As a Visitor Economy Strategy – the key **priority** must be to increase visitor activity, length of stay (both as more nights, but initially more practically by lengthening the hours of day visit through raising local awareness of what else there is to do around the destinations, as well as by creating appealing early evening destinations, places to eat, things to continue to see) and increasing spend into the area.

SECTION 4: UNDERSTANDING THE VISITOR - MARKETS AND MARKETING ACTIVITY

4.01. Introduction

This Section sets out an overview of the types of key visitor markets currently identified, painting a picture of them and their favoured experiences. It also looks at how various forms of marketing materials – mainly the print and online resources - are provided by the lead local agencies, as public and private sector organisations. Public relations activity is also undertaken by both public and private sector and although some of the results of this activity have been monitored in the local press during the period of this study, this does not constitute a formal review.

4.02. Target Markets to North Shropshire and Oswestry

The new research by Arkenford for Herefordshire, Shropshire and Telford[6], identifies *Cosmopolitan*s and *Traditionals* as the segments more likely to perceive Shropshire as **'My Type of Place' i.e:**

- **C*osmopolitans*** ABC1, age 45+, post-family, high income, urban based, active like arts, culture, shopping. Enjoy intellectual challenge and discovery, value peace and relaxation. 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. ABC1, aged 46 to 65. 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
- However, whilst liking the potential of Shropshire, *Traditionals* are currently a little below average in their actual presence here
- Shropshire also appeals to ***Functionals*** – a group who are fiercely independent and budget orientated, not seeking new experiences.

The county's overall generic marketing activity has been mostly led by Shropshire Tourism for many years although now with decreasing budgets. It has for many years mainly focused on specific key segments (and in the 2008 review[7] was recommended to continue to focus on):

Traditionals for '*rest and relaxation'*: short-breaks, safe but special, sightseeing, market towns, speciality retail (independent), museums and gardens, cultural events and gentle walking, local food and drink. Mostly ABC1

Discoverers for '*rest and relaxation'*: somewhere new and different to explore, short break or day trip, off the beaten track activity and sightseeing, local foods, museums and attractions, quality self catering or distinctive hotels and unique retail- 'England undiscovered', 'be yourself.' Mostly ABC1 too

Cosmopolitans for '*rest and relaxation'*: also somewhere new and different for a short break with a difference, more unusual activity, active and physically active eg cycling, walking, balloon trips, good food and drink and stylish accommodation, quality shopping (the more unusual the better), and a segment who will also look at a domestic short break in the same way as a European short break so long as the style and quality is high.

The major attractions however are a strong and focused marketing and PR resource, with good campaigns and often investing more collectively than any other. In 2010-2012, Shropshire Council

[6] Shropshire Perception & Awareness Research, Arkenford, 2012
[7] Shropshire Tourism Market Review, TEAM, 2008

has also been enabled to deploy formal PR and marketing activity through RDPE funding, largely focused on the Wenlock Olympic connection but to the benefit of the whole County profile.

The 2011 **North Shropshire and Oswestry DDP Marketing Strategy** has taken a simple pragmatic approach to NSO future activity at a time when there is little or no funding available and it will be important to harness all available funds to be able to adopt and implement even the most basic recommendations. A worrying feature of that work was the very poor response to the autumn 2011 business survey: just 19 out of 253 businesses responded to it and of those several did not complete it fully. A strategy can only be as effective as those who will benefit from delivering it want it to be. With such a low response rate it is impossible to draw any conclusions from the survey.

The Marketing Strategy has reviewed the Arkenford research and recommends that North Shropshire and Oswestry DDP focus their marketing efforts specifically on:

Day visitors – who match the *'Sightseeing and Potterers', 'Discoverers' and/or 'Traditional*' market 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.

The visitor surveys for North Shropshire and Oswestry show that the majority of day visitors are relatively local and come from within only half an hour's drive time (31%) or from within the county itself (30%), with 14% travelling for an hour's drive time.

UK Domestic Staying Visitors – matching the '*Traditionals', 'Cosmopolitan'* and '*Discoverers'* profiles: aged 45 plus, and from the socio demographic groups ABC1 and travelling without children. These should be targeted in the primary areas of the North West, West Midlands and London and South East, the latter not only because that is where the weight of the UK population sits but also because there are considerable markets coming already from that area to other parts of Shropshire and which must then be attracted to parts of the NSO product on the 'attract and disperse' model.

The DDP Marketing Strategy identifies the existing and recommended target markets in a more traditionally presented way thus:

Table 7: NSO Marketing Strategy Key Target Markets

Characteristic	**Day Visitors**	**UK Domestic Staying Visitors**
Main Geographic Location	1. 30 min drive time 2. Within Shropshire 3. 1 hour drive time	1. North West 2. West Midlands 3. London and 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	C1C2	ABC1
Main Activity	1. General sightseeing 2. Shopping	1. General sightseeing 2. Canal trips
Suggested Motivations from Business Survey	1. Rest and relaxation 2. Visiting the countryside	1. Rest and relaxation 2. Visiting the countryside

But bearing in mind the Arkenford research findings about visitors **most likely** to feel 'This is my kind of place' it would seem that there is some way to go to **maximise** the current repeater markets as well as to attract more of the elusive *Cosmopolitans* as well as the greater numbers of *Traditional*s and *Discoverers* and turn them into ambassadors for the NSO area.

Another facet of the tourism consumer to the area is the strong **visitor loyalty**, as seen by previous visitor surveys[8] looking broadly at the day and overnight visitors to the former local authority areas:

- 69% in Oswestry are repeat visitors – increasing to 84% repeat for North Shropshire – compared to an average 76% repeat across all of Shropshire, and 84% in Wyre Forest north Worcestershire (so the high levels are not dissimilar to other local areas)
- Day visitors are even higher in their levels of repeat trips - 78% to Oswestry have been before and 92% for North Shropshire
- 8 out of 10 day visitors come from Shropshire, Cheshire, North Wales and the West Midlands conurbation with surprisingly FEW from Manchester/ Merseyside
- They tend to be older and probably visiting favourite repeat haunts
- **But** the visitors only spend a relatively short time here: a half day or 4 hours for day visitors (slightly lower than the whole county figure of 4 hours 13 minutes or 4 hours 16 minutes in Coventry and Warwickshire) – but only around 2.5 nights for those stopping overnight (less than the 4.2 nights average stay across all of Shropshire or 3.5 nights in Coventry and Warwickshire).

Expanding on the activity of visitors and increasing the length of stay is a key element underpinning the strategy.

The marketing strategy suggests three distinct **priority marketing objectives**:-

- **Raising Awareness** of North Shropshire and Oswestry as a visitor destination worthy of consideration by these target markets
- **Presenting the 'drivers', products and themes** as an attractive and understandable visitor 'offer' (experience) to these markets, using a distinctive style and tone in all communications
- **Providing potential visitors with easy and clear routes** to find more information about North Shropshire and Oswestry and 'purchase' the product.

The consultations and research undertaken for this overall destination strategy lead to similar conclusions on these three priorities although with the third, it is felt that this needs to be **even more specific:**

- the requirement is to 'sell' and recommend clearly defined experiences and itineraries for visitors new to NSO or to existing markets in order to widen their knowledge of the area, bearing in mind the very high repeat visit data.

[8] Oswestry Borough and North Shropshire Visitor Surveys, The Research Solution, 2007

4.03. Presence of the Destination in Marketing Guides online and print

So, how does the NSO area appear within mainstream promotional guides, both print and online? Shropshire Tourism is a private company with a membership of around 500 of which some 90 are in the NSO area. It still produces the main *Shropshire and the Welsh Borders* A4 brochure and runs the Shropshire Tourism website www.shropshiretourism.co.uk as well many local websites, including that of North Shropshire Tourism Association www.northshropshire.co.uk and visitoswestry.com.

www.shropshiretourism.co.uk

Until fairly recently the Shropshire Tourism county website provided information on a more geographic basis - following the old district areas of the county but now offers information driven by a menu offering user choice on Where to Stay, What to Do, What's On, How to find Shropshire, Shropshire Towns, together with thematic listings under attractions, gardens etc .

- The online North Shropshire introductory page via 'Shropshire Landscapes' relates very much to the former administrative district, and does not include Oswestry
- Oswestry and its hinterland are then presented with pages related to the town and local borderland area

The picture painted of the NSO area on the Shropshire Tourism county website is broad, reflecting the varied landscape and assets:

> *So why North Shropshire? Well Dr Johnson reckoned it was 'a region abounding with striking scenes and terrific grandeur'*[9] *and who are we to argue? Admittedly that was in 1774… …So let's get more up to date - A 2001 survey in The Sunday Times identified North Shropshire as one of the top 10 best places to live in England……Here's a little taster as to why……*
>
> *You'll find peaceful countryside and a unique landscape of sandstone hills, meres and mosses, and the four pretty little market towns of Ellesmere, Wem, Whitchurch and Market Drayton where old fashioned service and a warm welcome awaits.*
>
> [followed by a page of description of sites and activities.]

www.northshropshire.co.uk

The North Shropshire Tourism Association site **does include** Oswestry as one of the five listed market towns of the north, and makes an effort to include locations across the border into Wales.

The introduction on the North Shropshire Tourism website www.northshropshire.co.uk reads:

> *Welcome to North Shropshire . Some say this is the quietest part of Shropshire and it's easy to see why - with a landscape of meres and mosses, full of wildlife (bring binoculars) and miles and miles of languid canals weaving their way through unspoilt countryside. They also take in the newest World Heritage Site at Pontcysyllte with the breath-taking aqueducts, surely not for the faint-hearted.*
>
> *With five distinctly different market towns and a positive scattering of pretty villages North Shropshire offers a real sense of warmth and welcome - just as you'd expect.*

[9] Johnson was referring to Hawkstone Park and Follies which he visited in 1774 en route to North Wales

www.visitoswestry.com

The www.visitoswestry.com website (managed by Shropshire Tourism) focuses in its introduction on the town's heritage, landscape and the cultural links with Wales:

> *Croeso - Welcome to Oswestry, in Shropshire. Oswestry emerges out of the mists of time into a landscape rich in folklore, legend and history. Buzzards soar and badgers play on rolling green hills where once the Marcher lords built their strongholds. Wild flowers and grazing sheep now cover the ancient earthworks of the Oswestry Iron Age Hillfort, said to be the birthplace of Queen Guinevere. Just one of innumerable places to enjoy walks, picnics, stunning views and perfect peace.*
>
> *Oswestry, named after King Oswald of Northumbria, who died in AD641. Here in Oswestry, Shropshire meets Wales and this borderland town is steeped in history, myth and legend.*

The website is inviting and the text goes someway to 'talk' to the potential visitor about things they might actually like to do and see:

> *Today the influence of Wales is still felt and you'll hear a blend of languages as you browse around. Rich in history Oswestry may be but it's still a vibrant and vital market town, the largest in the Borderlands, with more than its fair share of small speciality shops and a thriving street market. Bargains await.*
>
> *It also doesn't take itself too seriously but remembers people want to have some fun on holidays.*

www.oswestry-welshborders.org.uk

The 'Escape to Oswestry' brochure is the core Accommodation and Activity Guide produced by Oswestry Borderlands Tourism, the local Tourism Association, alongside its website www.oswestry-welshborders.org.uk . The OBT website is designed by virtual-shropshire, and shares some stylistic approaches. The welcome page is good at painting the English-Welsh hybrid nature of the outdoor area, and of the distinctiveness of the market town offer, however the quality of photographic images used lets down the opening impressions:

> *The vibrant border market town of Oswestry sits between the patchwork plains of Shropshire and the hill country that is Wales. Since the Middle Ages Oswestry has been a magnet for trade from both sides of the border. From wool to cattle, the markets have brought riches and visitors to this busy town.*
>
> *Nowadays the goods may be more diverse but the streets still come alive on market days. Listen – can you here the sounds of trade? Sometimes Welsh, sometimes English, accents local or from further afield, our little town positively buzzes!*
>
> *Recently voted one of the 'coolest places to live in England', you may wonder what makes Oswestry different. We locals like to think that it is the combination of a charming medieval town and an eclectic mix of independent shops and fine eating establishments that creates an ambience that is special.*

However, whilst refreshing in some parts, there is much to be done to improve the online presence of NSO in its **totality**. Maps, language and 'tone of voice', reciprocal links, events listings and so much more on search engine optimisation (SEO) could make a world of difference.

www.virtual-shropshire.co.uk

There is competition by many other providers such as Virtual Shropshire www.virtual-shropshire.co.uk , also long established but with a different look and feel and more rapidly changing imagery. Virtual Shropshire's evocation of Shropshire is rather different and does not provide any overall 'image' of the northern part of the country: instead it is driven by events and news and by specific activities on offer, though surprisingly 'canals' do not feature in its thematic search list. Each of the market towns has its own section but an unfamiliar visitor would not find his way to North Shropshire unless he had a good geographic knowledge of Shropshire.

4.04. Finding and Promoting the Local Destinations

The study's research nationally showed that providers appear largely to be thinking about 'websites' rather than overall 'online' and not thinking as they do when they themselves are visitors or potential tourists. Today's visitor if seeking for information online simply uses a search engine such as Google to search specifically for what they want – rarely is the full name of a website typed in these days. People search for what they are interested in, e.g. 'good restaurants near...' or 'places to walk with pushchairs', or 'cheap B&Bs in XX' etc. Mobile 'apps' have reduced the need even further and the likelihood of a Google searcher looking beyond the first or second page of results is small.

For example, searching for 'Ellesmere' on Google produced nothing but several pages of search results for Ellesmere College before a Shropshire Tourism result for an exhibition at....Ellesmere College. There were still no bespoke Ellesmere visitor-focused websites after 12 pages.

The quality and bigger businesses with highly professional websites and social media don't need the destination(s) as much as the destination needs them. For instance: Combermere Abbey and its events, luxury cottages and weddings on the borders near Whitchurch has extensive coverage for visitors and guests. Its website offers evocative descriptions of Shropshire and its neighbours:

> *In one hour you can be in four counties and another country! Explore the riches of Shropshire, Cheshire, Staffordshire, Derbyshire and North Wales. A wide selection of historic houses and gardens, museums and cities are easy day trips.*

But, there's **not much described** here about what is on the immediate North Shropshire doorstep – just a passing mention of its nearest market town. This is clearly a message about how venues perceive the greater destination.

A similar position is seen in the website description about Macdonald Hill Valley Spa, Hotel and Golf:

> *Stunningly located amidst acres of peaceful gardens, yet conveniently close to motorway networks, Macdonald Hill Valley Spa, Hotel and Golf is the perfect location for your stay, with relaxed country club ambience and stylish, modern interiors.*

Again, not one visitor attraction in North Shropshire is recommended, only Market Drayton to shop, and the 'Roman Market Towns', which when clicked through to lists of many local market towns is mostly alluding to Chester. Indeed consultations showed how much Chester was perceived as drawing visitors away from NSO.[10] Clearly the need to build relationships with the major businesses and attractions is paramount.

[10] Although Hill Valley Hotel itself was participative and keen for Whitchurch in particular to work more closely on its offer to hotel guests – see Whitchurch Town Plan.

Even a specific high profile location such as the Pontcysyllte World Heritage Site (WHS) www.pontcysyllte-aqueduct.co.uk does not do justice to the presence of Shropshire as a component of the WHS. Wrexham/Wales have approached the promotion of the WHS vigorously and have already started to segment the offer, showing that NSO has more work to do to match the style as well as the substance (albeit that Wales always has more money than England for tourism). Thus in sections of the WHS website, visitors are encouraged to explore the whole 11 miles area, with minimal English references;

> *A canter across* [Chirk Aqueduct] *will take you over the Welsh border and into England*. … I*f you're a serious walker, there are lots of intriguing walks and trails just off the towpaths, including the Ceiriog Valley Walk (which is lovely) and the famous Offa's Dyke*.
>
> *Journey further afield into Wrexham, Denbighshire and Shropshire and discover gems like the National Trust property at Erddig, the Clwydian Range Area of Outstanding Natural Beauty or the lakeside market town of Ellesmere.*

Again, the sections of Places of Interest and Food only cover places and sites on the Welsh side of the border, including the googlemaps. These make it look as if there is nothing at all on the Shropshire side of the border to visit, even though Whittington Castle and many other places of interest and food/drink locations are easily accessible. This is clearly an urgent opportunity for NSO to improve. It is possible that Shropshire Council may need to broker this.

4.05. Printed Literature

In terms of printed literature, now that Shropshire Tourism's own Shropshire-wide brochure no longer uses geographic areas as the basis for information, the identity of the NSO area is less clearly set out. However, there is a visually attractive double page on 'North Shropshire and Oswestry' with some of the products well highlighted e.g. Whittington Castle and Ellesmere – and a banner heading *'Where laidback people come – to slow down'*.

As noted, the Oswestry Borderland Tourism main brochure Escape to Oswestry provides a comprehensive coverage of the western half of the area, including into the Welsh border main attractions. It is funded mainly through business paying for inclusion, along with some public sector grant funding. Ironically, its own 2012 competition offers tickets either to the local Oswestry Truck Show or to the non-local Chester Zoo! But the back cover usefully includes a QR code for users to go straight to its information and accommodation website. It will be important to assess the impact of this.

The *Discovery Map of North Shropshire and Oswestry - Attractions Activities and Places to Visit* is rather more of a reference directory whilst in the area than a marketing product. It shows Whittington Castle and a view from Hawkstone Follies on its cover, but no people in shot. There is no QR code but a pleasant illustrated map showing attractions and facilities in NSO and lists plenty of websites and brief descriptions of the main NSO tourism assets.

The *Shropshire Days Out* folded maps has a large map of the county with no illustrations and information is only provided via the numbered paid entries and accompanying 'special offer ' vouchers. Nine out of 36 entries (one quarter) are in the NSO Borderlands.

The printed leaflets and brochures on NSO are many and a full list of over 30 printed NSO-related products is in Appendix C. The print is of mixed quality and in general there is an urgent need for a major shake-up in imagery, style, language and agreed key messages. This is covered in the action plans.

4.06. Making more use of the Communication Channels

The key strategic development recommendations and detailed Action Plan set out in Section 8 take forward the need to ensure that the best possible efforts are achieved from all forms of print and online presence for the area. The headlines and actions here give the broad direction to be taken. The Marketing Strategy, the parallel document to this Visitor Economy Strategy and written by Shropshire Tourism, sets out comprehensive approaches to the next few years' targeted activity for partners, with detailed focus on specific media, distribution and communication channels.

In addition there is a need to increase communication and improve the efficiency with which partners promote the area:

- Thus the need is to attract more NEW visitors from the key market segments of *Traditionals* plus *Discoverers, and Cosmopolitans* by presenting the offer in a more 'upscale' way where appropriate and making the **spending opportunities visible and easy**
- And to extend the stay, experiences and spend for REPEATER markets introducing them to other opportunities in the area they already like
- To increase overnight leisure visitor markets, grow business tourism customers, who spend more with local businesses and thus increase employment and business sustainability in a virtuous circle
- To achieve this requires an increase in NSO businesses' own detailed local knowledge of the local product and an ability to recommend and cross refer
- Supported by better profiling of the 'higher end' products and opportunities targeted at the 'right' markets
- Agreeing/using shared key marketing messages, 'tone of voice' and high quality, inspiring imagery that make the destination most appealing.

SECTION 5: KEY ISSUES INFLUENCING THE STRATEGY

5.01. Four Big Challenges: Perceptions, Product, Performance, and Partnerships

There are some major over-arching challenges and areas of opportunity that fundamentally underpin the strategy. These must be tackled if the area of North Shropshire and Oswestry, as a destination, is to lift its game and benefit from an increased and improved visitor economy. It is important that all visitor economy partners take on board the need to address the more basic actions required to get the whole area performing at optimum levels, as well as the significant product development opportunities already identified. The key challenges are:

1. Perceptions
2. Performance
3. Product
4. Partnerships

Focusing on these provides the framework for businesses, organisations and partners across the NSO area to respond and make a difference – that will benefit **V**isitors, the **I**ndustry, **C**ommunities and the **E**nvironment. This is the industry 'VICE model' approach to encouraging sustainable tourism.

5.02. Perceptions

VisitEngland's national research in different parts of the country (Bristol, Leeds, Birmingham etc.) found that residents' ideas of potential holiday destinations did not include Shropshire. The 2011 Arkenford perception research into the Marches area, generated fairly positive views about Shropshire as a whole. However, North Shropshire and Oswestry did not fare well in being identified as potential/likely areas to visit.

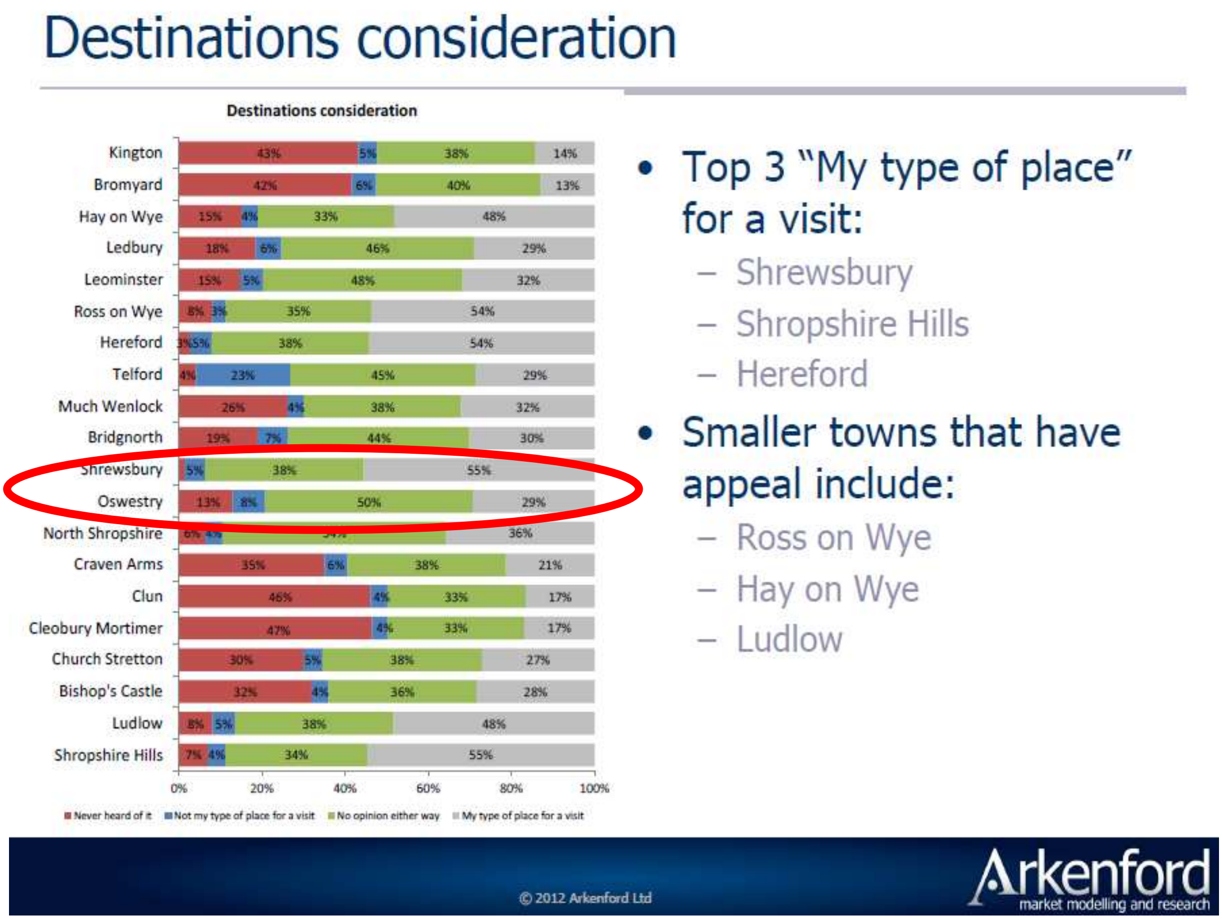
Profile and Perception of the NSO area:

Around half of respondents had **no opinion**, either positive or negative, about the North Shropshire and Oswestry area. They were unfamiliar with the area and product. The combined Oswestry and North Shropshire area **has the highest 'no opinion' result : this strategy and action plan must aim to change this.**

It is suggested that this lack of 'opinion', either positive or negative is reflected in much of the visible and contextual marketing of the area and its products. There is also a perceived problem of working collaboratively together across the north west and north east of the county when they **are** very different in feel and outlooks. But in macro terms these are still small areas geographically and, for touring visitors especially, in the segments identified, of no great significance.

It is important to reiterate that j**ust because the DDP is called North Shropshire and Oswestry does NOT mean that this is its customer facing offer.**

Profile and Perception of the NSO area



The NSO area overall is perceived as 'indistinct' – sandwiched between better known areas all around and over-shadowed by bigger players like Chester or well known destinations like Ironbridge and the Dee Valley/Llangollen. It is indeed true that mostly **because of its transport routes, NSO is a good area to stay in order to go and visit elsewhere but that doesn't have to be viewed negatively**. If economic benefit is at the forefront of thinking, then using that location and access as a driver for staying visitors means a growth potential for keeping them longer and introducing them to hidden pleasures more locally.

Visitors to Shropshire like the following:

- Visiting local towns/ villages/ countryside, scenic areas and landscapes are the **most appealing activity** when on holiday, to the target markets
- Good news is that the **strongest Shropshire association** is with market towns/ villages/ scenic countryside and landscapes for 89% of responders
- But, Shropshire is **least associated** with shopping, cultural exhibitions, events and festivals.

A major weakness of the area, seen in marketing terms and through the industry consultations and workshops is the **identity** of the area that has been meshed together as North Shropshire and Oswestry. **This is the greatest challenge for the Visitor Economy Strategy** to address, and will require the partner organisations to collaborate more efficiently and for the industry to sign up to an **approach that is less about tight geographical descriptions and more about visitor facing experiences and the landscape that they take place within**.

North Shropshire and Oswestry - A land of Borders

In the context of the overall marketing activity outlined above, it is not possible to discern a particular character or identity for 'Shropshire North'. Whilst much of the individual product is covered within the main online information channels and printed brochures, there is little or no sense of identity of an area as a **destination**. Whilst the NSO Visitor Economy Strategy is **not** a branding strategy, and there is a Marketing Strategy already, this is the place to create the base for development of a **clear image and identity** for the area. Creating and then promoting consistent messages to the target markets will help businesses and organisations clearly set out what and where they are and how they form part of the visitor experience.

We are suggesting fewer 'big themes' than first envisaged by the DDP, and the adoption of an identity based around the following ingredients. They are **not** marketing strap-lines **nor** a definitive brand for the area, but they provide a launchpad for further industry debate and ideas to consider around the 'tone of voice':

What are the benefits of NSO for the visitor:

- Slowing Down, enjoy life's Simple Pleasures, breathe deeply and take a stress free break. Rediscover a simpler way of life but within a high quality and surprisingly interesting environment, take it easy and see and enjoy more with less effort. Easy to reach and easy to get to other worthwhile places to enjoy.

The encapsulation

- Shropshire's Green, Blue and Pleasant Land (to stress the waters of the canals and meres)
- Shropshire's Lakes, Waterways and Gardens
- Essential England, Essential Shropshire - perfect exploring country, independent market towns
- The Shropshire Borderlands

Essentially, **the underlying theme is based around Water, Landscape, Discovery and Market Town**. The issue of having borders with Staffordshire, Cheshire and Wales (not really North Wales or Mid

Wales) is integral to giving the area an anchoring – without overly using 'North/Northern' Shropshire in public facing promotions.

It is proposed that a **brand and identity is developed around 'The Shropshire Borderlands'.** Here, the strengths and rationale are set out, in context with the majority of day visitors coming from the surrounding arc of conurbations, and overnight visitors from the North West, Midlands and South East/home counties:

- Geographically it locates Shropshire, as well as the parts of Shropshire. (Also borders in the UK tend to mean north and west to many of the main markets.) It is close to the North Wales Borderlands - so could be seen as an extension of this, although this Welsh brand has not got the same market profile as 'Snowdonia/ North Wales' or the 'Welsh Valleys'
- It does not interfere with other Shropshire brands and helps the county complete its own internal brand 'jigsaw'
- It will also be interpreted as borders of other counties as well as Wales and helps the strategy to link to attractions just over borders (Cheshire and Staffordshire) in the way that some of the bigger NSO attractions and hotels already do successfully.
- It emphasises an interesting and varied landscape - one of the main strengths identified
- It provides a backdrop in which lots more specific (major and niche) products can be presented and it hints at more choice
- This backdrop can then be used to present themes and types of activity which can take place across such a landscape
- It allows cross border tourism partners and attractions to feel fully engaged and willing and able to participate
- 'Borderlands' implies history and heritage too – castles, forts, crossing places and cultural interest, food and drink, language etc.
- It implies not too remote or extreme to get to – still associated with England.

This is a starting point proposition for the DDP and partners industry, to begin to overcome the 'Oswestry', 'Welsh Borderlands' and 'North Shropshire' rather parochial and poorly understood localities (by those from further away, especially by those who have never been to the area before).

The final agreed identity and language may evolve from '**THE SHROPSHIRE BORDERLANDS**' through a consensus building approach in the first year, with some inspiration from Appendix D.

The strategy aims to make the most of the area's **relative ease of accessibility** to maximize the opportunities for the expanding market for visitors with easy access needs, i.e. 'accessible tourism'. There needs to be a change of perception in marketing to encompass the realisation that this is not a niche field of tourism restricted to disabilities but one that appeals to a wide section of people. This is especially true for extended family bookings where family members may include older people or young children:

- Providing attraction and accommodation providers with informed, awareness led sessions would seek to reinforce the often missed opportunities to enhance existing facilities and to promote their own accessibility to a wider market. Changing perceptions of accessible tourism and preconceived ideas of people with disabilities is a vital key to this goal, as many existing providers still see this as a *narrowing* of their field of visitors, when in fact it helps them to *broaden* their appeal and markets
- Working with the charity 'Disabled Holiday Information' based within the north of the county and with considerable expertise in providing for and marketing to disabled day and staying visitors, would offer a practical way to update existing brochure and web content and to catch up on neighbouring counties that are getting ahead in understanding and

promoting to these markets. A suggested itinerary provided by the service is set out in Appendix F

- Since nowhere else in Shropshire does this especially well, nor has the flatter areas which lend itself to such distinctive product, this would seem an obvious project and will give NSO a point of differentiation. It is possible that a suite of itineraries and experiences could gain considerable media coverage
- There is also scope to link to the specialist hospital at Gobowen and recuperating patients and *Battle Back*, the £8m military rehabilitation centre being built at Lilleshall Hall further south on the A41.

5.03. Performance

The economic impact of the 2.2 million visitors coming to the NSO area predominantly sees 91% arrive as day visitors. **However, major economic impact comes from the 200,000 (9%) overnighters who generate £42m (37%) of all spend – four times their relative size.** This is not just from those staying at hotels, guest houses and in self catering, it also includes campers, canal boat users and the spending by those visiting friends and relatives as well as spend by their hosts.

In order to improve the below par performance of the overnight sector expenditure, there is a close link with the **Perception** challenge. Generating more income and increasing the length of stay is closely linked with raising the profile of the destination and making it clear how it is positioned against its competitors. Attracting new visitors, repeats and increasing visitor spend by changing the perception of the quality of the offer and cross-selling as well as providing more opportunities to spend is important to the area's economic performance. This will have some knock-on effect of increasing trip length both within the day (extending into the evening) and for those with flexible time, such as tourers at caravan sites and B&Bs, additional days may be added on to a visit.

Other aspects of the performance of the area relate to improving the quality and availability of the 'nuts and bolts' of the visitor experience. Whilst the quality of attractions, accommodation and customer care is generally high (seen from previous Market Town Benchmarking and visitor surveys), key weaknesses remain. These are: signage, lack of visitor infrastructure such as public toilets, availability of visitor information, often very limited Sunday opening hours, some gaps in accommodation provision, weak product familiarity in the sector and ability of front line staff to advise visitors, etc.

A key challenge to improve performance comes from the need to get the businesses of North Shropshire and Oswestry to really appreciate that they are in a competitive tussle with other visitor destinations – and not to assume that visitors will simply come. There is a need to articulate **why is HERE better than THERE?** Why should a potential new visitor or a repeat visitor make the effort to come here? Why should a day visitor from Manchester go to a canal here if there's a closer or better experience in Cheshire, Derbyshire or Staffordshire? Why visit this garden from Birmingham if more or better are closer to hand or better promoted, or the bigger names are in Cheshire or the Cotswolds or worse, in Wales and a visitor even drives past those in NSO …?

There are some aspects of the area which are stronger than the local partners appear to recognise, there are some great assets not shouted about loudly enough. For example:

- There is a good range of luxury end self catering/B&B and intimate country house hotels – why aren't they more engaged as a group and used as brand leaders and in the vanguard for the 'destination sell'? Combermere Abbey, Goldstone Hall, Soulton Hall and Bon Accueil are good examples

- The Meres and Mosses are a landscape recognised as being of international importance – why not use that USP to the advantage of the area and target particular markets who like, National Parks, AONBs and quality nature-based tourism but who may also be specialists in their own field and can bring conferences field trips, etc? The HLF Landscape Partnership project may go some way to achieve that.
- Tripadvisor's reviewers provide many positive ratings and comments about NSO establishments within the overall best in Shropshire (as at June 2012) for several categories:

Tripadvisor Top-rated hotels		
1 Premier Inn Shrewsbury (Harmers Hill)	5/5	In NSO
2 Pen-y-Dyffryn Country Hotel	4.5/5	In NSO
3 Rowton Castle	4.5/5	Not in, west of Shrewsbury
Top-rated B&Bs		
1 Penn Peel Cottage	5/5	In NSO
2 The Old Rectory Wheathill	5/5	Not in, S Shropshire
3 Greystones	5/5	In NSO
Top-rated restaurants		
1 Restaurant Severn	5/5	Not in, Ironbridge
2 Fennels Restaurant	5/5	Not in, Shifnal
3 Sebastians, Oswestry	5/5	In NSO

Top-rated things to do Attractions

Hawkstone Park is the only NSO attraction, squeezing in at ninth position, despite its Follies' heritage as the UK's oldest 'theme park'

So overall, performance across North Shropshire and Oswestry is mixed, with many gems known to some visitors, but not really being talked about and promoted as much as could be done. An approach of *Polishing the Gems* should raise the presence of these businesses which can help to encourage more local competition and up the quality and performance of others:

- Shout louder about the best and make a noise to attract attention
- Give higher profile to leading businesses and locations that attract more **visitor awareness** in the first place – then draw in others in the 'slipstream'. This is not about favouritism or supporting the 'big boys', but leading with a strong hand - there is a need to get the profile raised up in the first place so using the distinctive sites (businesses, retailers, venues, etc. both small and large,) and better known and visually strong locations. The process then needs to communicate this such that all businesses understand and buy into this approach
- Strengthen the adjacency of Shropshire businesses, villages and towns to the Canals World Heritage Site attraction, which is heavily promoted as being Welsh, despite a borderland overall WHS designated area including Shropshire
- Give higher PR and marketing profile to the assets that are unique, special, quality, distinctive and quirky - of which there are plenty across the NSO area and which provide a visitor with a reason to go somewhere different
- Raise the profile of the market towns – and show off their individual personalities - they offer a truly distinctive experience for visitors from the conurbations – and are a key priority with partnerships already in place.

- Encourage the premier quality accommodation venues and finest offers to promote as a cluster of quality - showing off the best that the area has to offer. Many other counties use 'prestige' or 'premier' collections in promotional activity; examples in Northamptonshire www.britainonshow.co.uk/northamptonshires-finest-accommodation/ and the Cotswolds www.cotswoldsfinesthotels.com/ promote such groupings

Across North Shropshire and Oswestry there are certainly many facilities that could fit this approach, or ideally be used to drive a similar campaign across Shropshire as a whole. Businesses include: golfing resorts, pampering and spas, fine dining restaurants, high quality country house hotels and some retail and specialist suppliers– eg jewellery, art, gunsmiths. The appeal is to those target markets that can deliver increased spend, drawn in by the higher quality core product, then package the wrap around experience that includes distinctive and special local trips and products which benefit a far wider range of local businesses that may not have been able to reach out to these visitors in the first place. Retaining visitors and spend locally will directly support the local economy:

The strategy is not just about attracting new visitors, but also getting more spend and positive recommendation from those already here. At a number of locations, visitors gather in large numbers either to stay or to visit an event, but may not have much interaction with the immediate area. For example, Oswestry Showground brings in thousands to festivals and events, many who leave not knowing anything about the area and having had limited time or a chance to spend off site in the town and attractions.

Other performance actions include:

- Gaining from these visitors who are already here, at events, larger hotels, golf resorts, caravan/camp sites, etc. is easier than the efforts required attracting new people in to the area in the first place. Also, **these account by volume for the bulk of overnight guests to the area** more so than the smaller numbers at B&Bs and self catering properties, etc.
- Attracting more major events, not all necessarily leisure tourism based, but including sporting/ hobby events which draw enthusiasts in from across the region and country can have more impact on larger scale visitor numbers, bednights and value
- All events should provide local exposure of what else is in the area, with opportunities to attract people back for future leisure visits
- A key strength of the area is the independent small business, with limited national chains, so economic benefits truly remain in the local economy in terms of supply chains and employment. 'Plugging the leaks' is a concept of making the most of every pound that enters your local economy (New Economics Foundation – Local Multiplier 3) – which aims to re-circulate visitor money spent locally three times around, and not see it leak away from the local economy to destinations further afield – which works well in independent led NSO
- There is some cause for concern in that there does not appear to be sufficiently strong local knowledge about the area and its assets. The industry delegates at the strategy planning workshops were on the whole not able to characterise the area well, or to draw up recommended itineraries/ packages and felt unable to describe adequately the products and facilities beyond their immediate locality
- Product familiarity and cross-promotion by businesses is important to make this work – we *are* all in it together!

5.04. Product

'The small things of life were often so much bigger than the great things'…

Barbara Pym, 20thC author, born in Oswestry

Enhancing the product offers one of the great sets of challenges, with such a varied range of assets attracting visitors. A dozen primary and supporting product themes have been identified in Section 3. Here, key high level issues are considered in terms of influencing the detailed action planning.

Overall the challenge is to **make best use of the existing products** and set out to make them much **more distinctive and particular** to the NSO area. Thus they can stand out in the market place and be clearer to the potential visitor to start to understand what the area has to offer them. Some of the assets are notably more high profile and have greater resonance with their audiences than others, these should be used to spearhead the promotion – backed up with strong imagery and evocative language that entices the visitor to make a trip.

Many of the products actually lie in **relative geographical groups; clustering experiences** will make it easier for the visitor, grouping them together into key areas of interest and commonalities, giving greater ease and clarity. Producing a range of sample itineraries/ suggested activities and experiences in local groupings, highlighting visitor products and experiences which match some of the Arkenford research target markets will better fulfil visitor needs. *Discoverers and Cosmopolitans* want new and unusual – an insight into another world that isn't their own – so this is where options for 'niche' markets comes in.
There is some differentiation of cluster areas:

- Along the **western borderland** with more **dramatic landscape, walking, heritage and larger attractions**
- The **central area** has the main cluster of **wetlands, the Meres & Mosses, nature reserves and easy access landscape, good for cycling and flat walking**
- Along the **eastern corridor** of the A53 and A49 there are many small scale **heritage attractions and gardens**
- The **market towns** and **canals** are integral and spread throughout – each can offer something special.

What must be avoided is the easy ability to slip into describing and promoting *'diverse attractions'* or '*something for everyone'* - phrases that can often be the kiss of death to a destination, only implying a hotchpotch of things strung randomly together with no real clear reason to come. Descriptions must be accurate, but don't over-promise and under-deliver. The customer who is short-changed will not return or recommend to others.

Landscapes, waterways and gardens

With the **landscapes**, they are not premier league 'must see' landscapes, so the challenge is to strengthen all imagery associated with the area and make it appealing, drawing out the gems that can most give character to the identity of the area. Visitors should be visually directed to viewpoints and breathtaking vistas – along Offa's Dyke, at Hawkstone Follies, across the largest meres, down a flight of canal locks, etc. There is a cross-over between the leading product themes of landscape and **canals and meres** – there is no point separating them, but make the most of the grand setting, whilst also highlighting the local site detail. Making the link with the meres and other forms of water – 'Shropshire's Lake District' – as well as the links to the upper Severn, reinforces an identity closely associated with water, waterways and waterside activity which for many can be a motivator to make trips.

With **gardens** there is considerable opportunity to 'piggy back' on the investment already made by Cheshire and the blurred boundaries. This again links with the continuum of the landscape and has a greater ability to make the distinction from southern Shropshire, with its fewer gardens and parklands.

Market Towns

In the Marches LEP Growth Plan market towns are recognised as needing **more footfall** to support the vital supply chain that the visitor economy drives. Shropshire Council's support through the *Market Towns Revitalisation Programme*, neighbourhood plans and joint area committees is to be welcomed, along with local plans to re-energise the high street. However, the market towns' businesses and 'welcome' must respond commensurately. Quality and value for time and money rule; making the visitor journey seamless so that each visit is a pleasure and for new visitors, an unexpected delight.

Some of the other towns mentioned their 'fear of being dominated by Oswestry'. In fact the other towns' own success can come from being **aligned with** and distinguishing their offer. *Visit England's* marketing approach is majoring on the **'If you liked that, then you will like this...'** technique, which allows smaller 'versions' of better known sites to bask in the glow of reflected similarity of experience. So, at macro level, '*If you liked Cambridge then you'll like Shrewsbury or Worcester*,' and thus at local, micro level…' '*If you enjoyed Shrewsbury then come and enjoy Oswestry and our other market towns in The Shropshire Borderlands*'.

There should be greater collaboration and less direct competition between the five market towns; looking outwards and thinking how the visitor can be enticed to visit them as a suite of locations and spend. Detailed action plans have been produced for Oswestry and Whitchurch, but a range of generic issues can be implemented across all the towns that will benefit both the visitor economy sector and local residents, so there is greater reason for support:

- Individual support for localised towns - protect their independent retail, differentiate offer from supermarkets, strengthen them as key development clusters
- Use of Market Towns Revitalisation Programme Board Funding Packages which already has identified a range of activities (built environment, townscape, retail, food drink, signage, heritage , B&B skills, quality upgrading, entrepreneurial support, heritage attractions, markets, welcome entrances, car parks, etc) with projects approved, and hundreds of £thousands of funding and similar match contributions
- Develop better information provision and itineraries distributed to visitors at the camp sites and larger hotels on the fringes of several towns.

Brought together, the strong northern products of canals, meres, gardens and market towns begin to provide differentiation from south Shropshire's imagery of Hills, the Severn Valley and appealing to the West Midlands day visitor market.

Walking and Cycling

Much effort is being made to develop **walking and public transport** connections across the county, particularly through the Walking with Offa joint programme with Welsh local authorities along the western borders. Development and promotion of **circular routes and short trails** across the NSO area is achievable and much more attractive to general walking markets than long distance routes. Working with Ramblers and HF Holidays, who now have a base at Church Stretton, it may be possible to develop specific products which will appeal to commercial walking companies with a spin off in overnight stays. Canal towpaths are ideal for general, short walking visits, although require loops out to other sites to avoid linear return walking. The new Google mapping support programme for the Canal and River Trust will assist this.

The flat areas of NSO offer opportunities for **'soft cycling**' i.e., young families, less mobile and 'holiday cyclists' if they could rent a bike upon arrival. Such routes need careful identification by local experts, lack of user conflict and joint marketing initiatives. There are also opportunities for local businesses to hire out electric bikes and the flat areas make it feasible for those less mobile or fit markets to enjoy appropriate routes. This can be a good point of distinction for the area. For those requiring more hilly ground there are still the areas around Hawkstone and Oswestry offering more activity. An early action should be to develop cycling itineraries linking a number of countryside attractions and stopping places.

Encourage the adoption of electric bicycles and vehicles for hire e.g. at larger accommodation businesses, attractions, caravan sites (Hawkstone Park has a Renault Twizy available). Rural access and product grants can contribute to purchase and promotion of such schemes.

Events and Festivals

Events and festivals take place across the whole area, developed and promoted by local organisations. However, there appears to be no real marketing drive in many of the destination websites, they are simply listings presented in old fashioned ways of what is on and when. Looking further afield at other websites presenting this year's 'cool' festivals, it is easier to see the difference eg *Latitude, Wilderness Festival, Hay* etc. which have greater presence and become integral to the destinations, not just stand alone events. There are some easy ways to improve festival and events visibility very rapidly in NSO. Social media is increasingly important and used by the likely target markets who will Tweet and Facebook their preferences in a constant stream. Consider how recent coverage of the 'West Arms' near Oswestry 'trended' as a result of Giles Coren's TV recommendation.

Public Transport

Public transport connections across the rural north of the county are far from perfect. However, where good regular transport links exist every effort should be made to promote their use. Partners need to consider how the consumer from outside the county thinks; many of those living in the major conurbations, suburbs and commuter towns are much more used to using public transport than the rural population of NSO and will be willing to take a non-car based trip but only if they can be offered a reliable and consistent service. Low carbon transport options should also be promoted as fun and relaxing ways to explore the local areas. Benefits will include:

- Greater choice of travel options for visitors and more visits from people who do not own cars (an increasing trend in urban and younger populations)
- Less congestion and parking problems in towns and becoming known as a more attractive destination for visitors with environmental concerns
- Visitors tend to enjoy low carbon travel more and experience the local area in more depth
- Low carbon options encourage people to explore and spend in the local area rather than travelling further afield
- Public transport services generate more revenue and can be sustained for the benefit of local people and visitors.

Opportunities include:

- Promotions to nearby markets for weekend breaks and days out by train – working with train operators and businesses in towns such as Whitchurch, Wem and close to rail stations, that can pick up travellers from stations and return them.

- The 'slow down and relax' and 'rediscover life's simple pleasures' themes could play well in neighbouring urban areas and suitable rail walk-stay packages which promise good accommodation, food, good service, exploring and independent retail to lift the spirits could be a 'demonstration' project for the DDP.
- Railway walks should be developed and promoted; it is done well in Wales on the Heart of Wales Shrewsbury to Swansea Line, the Cambrian Line from Shrewsbury to Aberystwyth and also on the Cotswolds and Malvern Line. Walking trails mean that one can get off at a station, explore an area, and return to the initial station or another stop. Promotion is largely online and with rail partners, using the local NSO stops connecting to external cities.
- Promoting days out itineraries by public transport using good bus routes linking visitor attractions and destinations is probably more an ideal than a reality at present. If a reliable service exists, it can be promoted as an attractive and convenient option.
- Improving transport information on all destination websites - include information on taxi companies, car hire, bicycle hire and links to key websites such as Traveline, Traintaxi and appropriate apps such as 'next bus'.
- Working with tourism, attractions and other businesses to improve the transport information on their own websites e.g. through workshops or travel planning with clusters or individual businesses.
- Promote the best ways to reach each end of sections of popular linear walking routes such as Offa's Dyke, the Shropshire Way and the Sandstone Trail. Walkers Are Welcome groups could research and promote a series of walks from their town using public transport. Link up with "Walking with Offa".
- Festival and events should include more public transport information and special transport arrangements.

Use specialist destination businesses that drive reasons for visits

Not everyone makes a visit based on coming to the actual destination as an *area*; some specifically choose to visit because of a particular *favourite business or product supplier*. The strategy should also focus upon the small scale and look to give higher PR profile to the business types that already drive destination visits. Whilst the process cannot unduly favour promoting one business over another, there is great value in using existing success stories to motivate markets to make a visit and to use these businesses to symbolise particular campaigns. These include:

- Destination restaurants/ pubs/ cafés etc. that are known to draw people out for visits – e.g. Sebastians restaurant (Oswestry) The Boathouse (Ellesmere), The Dickin Arms (Loppington), Jack Mytton Inn (canalside at Hindford) etc.
- Garden Centres / specialist plantsman nurseries, including Hadnall Country Garden Centre, country roses, Moreton Park Garden Centre at Gledrid, etc.
- Specialist independent retail, e.g. vintage / clothing shops, photographic, lighting, etc. within the market towns
- Arts/ crafts/ reclamation centres/ antiques, e.g. Willow Gallery (Oswestry), North Shropshire Reclamation and Antique Salvage (Burlton), Whitchurch Antiques, etc.
- Food producers/ outlets/ farm shops – including Park Hall Farm and Fordhall Farm.

Reunions and large groups – opportunity market

The large visiting group market is emerging nationwide as a growth opportunity segment. Studies elsewhere in Cumbria, Warwickshire and the Brecon Beacons have highlighted the growth in large group family and friends visits, for reunions, anniversaries, significant birthdays etc. that can book out a single large establishment. This is seen in both mid-upmarket self catering businesses and larger group accommodation – whether converted farm unit cottages for multiple lets, or bunkhouses or converted large houses/ former pubs.

There are a number of these businesses in the north of the county, including Bon Acceuil (Whitchurch), Soulton Hall (Wem) and Combermere Abbey (Whitchurch) already appealing and directly promoting via specialist websites to these large groups. The good road access which means travellers can meet mid way from all over the country – as well as the fact that the hub-and-spoke location allows visits to nearby Chester, Wales, Shrewsbury, Ironbridge etc. appeals to many.

Future larger development opportunities

Whilst the essence of the strategy is about working with the existing product assets, sites and businesses, and enhancing them where possible, there will always be larger development opportunities, planned and speculative, which arise from a variety of origins. This may include commercial town centre development that has a secondary 'win' for the visitor economy, perhaps benefiting the retail or street environment; existing businesses making major investments; or projects which harness heritage, arts, regeneration or rural funding to improve the quality of life and environment, which also benefit the visitor economy and should be supported by this strategy in terms of how they provide more reasons to visits, better quality improvement to the product, etc. All this is in addition to the ongoing modest investment that comes with refurbishing a hotel, adding an extra suite of rooms, developing a new product or building at an attraction, increasing canalside facilities, art or interpretation, etc. All of which provides for improved or additional visitor experience.

There are several key development sites and projects which have already been identified and now offer potential for significant growth and investment – including the restoration and extension of the Montgomery Canal, the boatyard complex at Ellesmere, the Cambrian Railways at Gobowen and Oswestry, and Oswestry Football Ground. Additionally projects may emerge such as improvements to the World Heritage Site Gateway, with the establishment of a Shropshire Gateway around Gledrid/ Poachers Pocket/ Lion Quays area. Some will be dependent on public sector funding, others on private entrepreneurialism. The former will need to be reassured that such funding will provide the return on investment for funders; the latter will wish to see a focused strategy and action plan in place to drive footfall into their businesses. [11]

The anticipated canal development projects including the Montgomery Canal, the World Heritage Site visitor facilities development and the Whitchurch marina and other private sector canal and waterside leisure development will be vital to the improvement not only in visitor experience but also critically to the "visibility" and identity of the destination. Ellesmere's complementary canal and waterside development, not only of its emerging sculpture trail, but also of other mereside activity and linkages to the town itself will ensure more product and greater dwell time.

If these projects do not go forward there is a considerable risk that the identity of the area, as discussed, will continue to be indeterminate and unclear. The incompleteness of the Cambrian Railway with its desire to reinstate the link to the mainline in future years, will bring associated benefits to mainstream businesses and to residents at a time when central government is supporting rail growth and when all the recent statistics for rail users show growth in demand. It would appear

[11] E.g. Hawkstone Hall is currently on the market for £5m and there is some talk about a possible hotel/leisure development.

to be a natural project for the LEP and Shropshire Council to support, and for some funding to be sought from the Sustainable Transport Fund and RDPE.

The Montgomery Canal plans are well advanced and the new Canal and Rivers Trust appears to have launched without problems after the demise of British Waterways. There are threats to the western landscapes of NSO from the possible fields of pylons and certainly the Canal's environs could be damaged if these go ahead. The need to "join up the dots" of the canal route and provide spending opportunities in hospitality and retail along the route is glaring. The success of other canal projects such as the Kennet & Avon, the new Droitwich ring, and the Stourport canal basins, provide useful comparisons, showing usage on land and waterside and the regeneration outputs. By providing a **full** canal experience for visitors, both landside and on water, the NSO will start to demonstrate its ability to offer a satisfying visitor stay and consequent economic and employment benefits for the local economy.

In all these cases, the DDP should have an official 'voice' and be supportive of the projects, championing the benefits for the visitor economy, diversity of attractions and new jobs and visitor interest that will be created. The DDP and members should help identify how the proposed project meets and is supported by the Visitor Economy Strategy, which will assist in funding bids. It may be that the DDP is not able to have a direct role in making the projects happen, but it should definitely be seen as an essential body to do business with in order to help grow the size of the product range in the NSO visitor economy.

5.05. Partnerships

From the consultations and workshops, it is clear that there are many partnerships across the area, varied in strength, often with different starting propositions that have had mixed impact on the visitor economy. The groups are quite varied in scale of coverage, 'membership', responsibility and impact.

- In tourism terms, the two main organisations linked with the private sector trade are North Shropshire Tourism Association and Oswestry Borderland Tourism. These have broad memberships (90-100 each) are led by promotion of their local areas (web/print/ PR), and work closely with the Visitor/Tourist Information Centres in their local areas
- However, they don't have a great deal of involvement in product development and members are mainly signed up for the promotional benefits. Communication between the two organisations is limited, and both have long standing perceptions of their territories
- The Destination Development Partnership itself is poorly understood as a new vehicle by the trade and other organisations, and does not have a clear public face as to its role, the activities and identity of its Board members or of its capacity limitations. This is a worrying factor looking ahead as it is the lead body, albeit without a great deal of delivery clout, to direct and monitor the progress of the Visitor Economy Strategy and Action Plans and there is a need to resolve this.
- Understandably, there are numerous localised partnerships in each market town; and various market towns initiatives/ regeneration groups have had some long standing success in developing and delivering town enhancement schemes. These groups generally have public sector support and secretariat through Shropshire Council and Community Regeneration Officers. Many projects and aspirations have strong cross-over with the visitor economy which is seen as important in most cases as it is part of townscape/ retail/ attractiveness/ activity in the market towns

Looking across the border, there are several partnerships at differing levels of relationship:

- Marketing Cheshire is willing and able to work with NSO and Shropshire as a whole to ensure that visitors are maximised across all the area's businesses. Specific programmes already blur the boundaries, such as the Gardens of Distinction campaign, and these and other proposals will be developed in the strategy and action plans
- Staffordshire is also able to work together with NSO where relevant and local NSO businesses can benefit from the activities of the Staffordshire DMP, particularly around the Market Drayton area and with canals which are a leading product in both counties
- Powys recognises the proximity of its north east cluster around Welshpool and the Shropshire borders, especially with Offa's Dyke Path as a key rural asset, already well linked in with Shropshire and currently packaging product, transport and business developments
- Wrexham has the assets of the canal WHS and major National Trust houses, but recognises the link to Shropshire/Oswestry and gateway towns of Chirk and Oswestry.
- National Trust, the Canal & Rivers Trust are examples of partners needed for the long haul

Part of the challenge is not only to make these partnerships work better and to truly adopt the need to enhance the visitor economy, but to also ensure that all the right businesses and organisations are closely enough involved and understand the direction that is being headed in. Some of this will be built as the status and understanding of the Destination Partnership grows, being recognised as the lead vehicle directing the area's visitor growth. A key anchor to the partnerships will depend on agreeing the identity and how partners respond. THE SHROPSHIRE BORDERLANDS approach to branding is seen as an enabler in this respect.

By using the broader (not specifically Shropshire) cross-border **experiences** to drive visits, using the better known attractions (canal World Heritage Site, Welsh National Trust properties, Cheshire Cholmondeley Castle, etc.) can be made to happen relatively quickly.

The alternative is to focus on driving up the perception of Shropshire as a whole; the NSO area as a key part of it is likely to take far longer and be a more costly process involving more brand and image development. And at a time when there is scare resource. There is an element of weighing up the 'trade off', and where some loss of 'Shropshire-ness' is considered acceptable, balanced by the benefit of the businesses in the local area receiving more trade through broader area exposure.

SECTION 6: DEVELOPING A VISION AND KEY PROGRAMMES FOR THE VISITOR ECONOMY

6.01. Towards a Shared Vision

Setting out a shared **Vision** for the area has been no easy task for this varied locality with its inward and outward looking foci and cross-border partnerships of differing strengths. Generating a way forward that most who are involved in the visitor economy can recognise and sign up to is vital. The Vision is aspirational and moves on from the *status quo,* but is realistic, or else partners and operators will have no faith in it – they must believe in the Vision and that it can deliver real change.

At the core of the NSO Vision is a simple truth:

As a visitor to THE SHROPSHIRE BORDERLANDS you will see and appreciate so much more when you take time to step back from the pressures and pace of normal life and relax by exploring and enjoying the simple but genuine pleasures of this fascinating part of Shropshire. You can be yourself: It is easy to get to and won't break the bank – but if you want to splash out then you can – there is quality accommodation, fine dining, spas, golf, horse racing, miles of excellent walking and cycling trails with luggage transfer, shooting even, and good independent retailers.

The full Vision for the Visitor Economy is;

As a visitor to THE SHROPSHIRE BORDERLANDS you will see and appreciate so much more when you take time to step back from the pressures and pace of normal life and relax by exploring and enjoying the simple but genuine pleasures of this fascinating part of Shropshire. You can be yourself: It is easy to get to and won't break the bank – but if you want to splash out then you can – there is quality accommodation, fine dining, spas, golf, horse racing, miles of excellent walking and cycling trails with luggage transfer, shooting even, and good independent retailers.

By 2017 ***THE SHROPSHIRE BORDERLANDS*** *will be well regarded by UK discerning visitors looking for an authentic alternative - particularly those from the surrounding conurbations - as an ideal place to take your foot off the accelerator and relax, making time for yourself. This is where you come to find your inner peace, recharge and be re-energised. Fascinating and surprising borderland landscapes, festivals, bustling market towns, unique lakes and waterways, excellent gardens and heritage sites are easy to find and go hand in hand with good, locally produced food and drink.*

Its quality accommodation and gems of local independent businesses offer 'time out' experiences with welcoming staff, as well as meeting places that are easy to reach. Its proximity to well known attractions in nearby counties and across the Welsh border makes it an ideal centre for short breaks or even longer - as visitors will discover a series of hidden pleasures, appealing largely to independent-minded audiences who want something unusually rewarding.

Information about THE SHROPSHIRE BORDERLANDS will be seamless, quick and easy for all visitors to put together and book their perfect, personalised break. Independent and specialist retail or activities add character to these borderlands and the necklace of thriving Market Towns will offer distinctive and individual experiences – each town being happy to recommend and be knowledgeable about each other. Weekends will be good times for visitors to escape from urban areas and take a Shropshire Borderlands Break knowing there will always be something going on in the area, especially in the market towns such as specialist markets, food fairs and quality *attractions. Both day and staying visitors will find unexpected delight in vibrant and quirky cultural events and festivals and make some surprising discoveries in the area. Walkers and wildlife enthusiasts will be particularly well catered for.*

The increase in visitor awareness, length of stay and spend will generate a growth in the visitor economy, adding 5% growth year on year and supporting an increase in local employment and business investment in their properties.

The Vision is rooted in a realistic appreciation of the current situation and a desire to achieve manageable improvements. This part of Shropshire's landscape and heritage evokes in visitors a memory of the lost England of their childhood, rose-tinted though it may be. Its genuine character, its real working rural lives still intact, its charming, bustling market towns within an authentic rural borderland offer a glimpse of life's true simplicity to all who live and visit here or just pass through.

Well known for its independent market towns and shops, connoisseur gardens/nurseries and easy to get round landscapes and waterways, the NSO area needs to positively attract more day and staying visitors to explore the countryside and market towns. It will use its location as an asset, located centrally between the surrounding World Heritage Sites of Welsh aqueducts and canals and the Ironbridge Gorge and the better known destinations of Chester and Shrewsbury.

There will be more retention of repeat visitors in the NSO area discovering previously unknown delights, as well as increased overnighters attracted by a clearer identity of what there is to see and do. With much 'top of the class' accommodation, venues and niche specialisms, the NSO area will differentiate its experiences and target new customers particularly from the surrounding accessible conurbations.

The area will play to its strengths; it has retained its essentially quiet and peaceful nature and boosted its string of market towns, the backbone of its product.

6.02. Underpinning Principles Delivering the Vision

The DDP needs a set of underpinning principles to achieve the Vision for the visitor economy:

1. **IMPROVING PARTNERSHIP WORKING**: in a complex area of multiple structures and organisations, to create and support the idea of a 'destination', it is vital to strengthen the working linkages between local groups, sectors and wider area bodies that are effective and do not 'turn off' the private sector. Improved integration of activity and cross-selling between the private, public and third sector involved in both the visitor economy and business in general.

2. **INCREASING AWARENESS** of the area: create and agree a clear identity for the area to communicate to local businesses and to the potential consumer. Raise awareness of the importance of the visitor economy, and the breadth of its product, and lobby for support: with partners, funders, politicians and decision makers – for initiatives that enhance NSO, its perceptions, landscape, communities, and financial contribution to the county economy.

3. **SEEING THINGS AS OTHERS SEE IT:** arguably too many viewpoints are from within, and so the need is for businesses and the public sector to see everything from the visitor's point of view and to look outwards to consider what else and where else competitively the visitor might be considering visiting and how other are investing and targeting their trade. In short taking a balanced perspective without parochialism and understanding the visitor journey.

4. **CREATING EVOLUTION, NOT REVOLUTION**: things can't change overnight without major resources – so the majority of need is to evolve the offer through incremental changes. The nature of the area and many of the businesses mean it cannot be about major transformational change; rather it is about maximising and exploiting business-led opportunities and packages that are right for NSO markets. Where development site opportunities are right for the area, the DDP should support, even champion these for the longer term benefit to the area and economy. Where external funding may be applied for it will also be vital to have all partners on board.

5. **HAVING REALISTIC AMBITIONS to IMPROVE**: the 'ambitious realism' approach to encouraging more and better experiences; the need to improve the quality of visitor experience and the length of stay is paramount but be realistic and don't run before you can walk. Minimising negative impacts to attract visitors and deliver exceptional rural experiences. Learning from each other and not 'reinventing the wheel', especially where online and other opportunities already exist.

6. **RECOGNISE THE ROLE OF THE MARKET TOWNS IN THE BROADEST SENSE:** the anchoring role of the five market towns is not only about their role as local retail, hospitality, catering and heritage destinations in their own right, but the fact that the towns are home to a great many of the local workforce, they generate the reasons why a bus or train service still passes through the area and they act as a hub for other services that benefit the visitor economy.

7. **BEING ROBUST BUT SENSITIVE**: rooted in consultations, business and community buy in; mostly positive consultation has brought the strategy development this far, and now further ongoing work is needed to get the right balance of actions and goodwill to implement them.

8. **24/7 ALL YEAR ROUND:** support local employment and more sustainable year round operation for businesses benefiting both local communities and visitors - by emphasising increased length of stay, visitor spend and opportunities for visits across all seasons. Remember the internet never sleeps, communication constantly flows in two-directions and can be used both negatively as well as positively, so needs to be watched and managed.

6.03. Strategic Aims

The following Aims are core to the strategic approach.

Top Ten Strategic Aims

1. **Increase value and volume of the visitor economy** to the area and county through better product performance, new product development and investment and working smarter between all partners, both online and offline

2. **Raise external and internal awareness** of the NSO area as a quality accessible rural destination offering rewarding outdoor and indoor experiences; the sum of its parts being greater than expected

3. **Strengthen links overtly between the five NSO market towns and their countryside**, to encourage a two way flow of visits and how visitors can best access the natural heritage, environment and landscapes. The Meres and Mosses LPS will help activate this approach

4. **Capitalise on the better known assets of Shropshire and neighbouring areas** to encourage slip stream visits to NSO on the 'if you like this, then you'll like that' model
5. **Achieve improved communication and sharing of visitor insight**, as well as market intelligence amongst businesses and organisations involved in the visitor economy
6. **Create higher level of industry knowledge and familiarisation** to provide better advance promotion and information for visitors when they are here – 'must dos', 'must experience' etc.
7. **Support local enterprise, encouraging business clusters and networks** to increase business success, yield and capacity, sustainability and the quality of local provision
8. **Articulate better the NSO heritage and landscape, increasing understanding and appreciation** through interpretation, events, festivals etc. Help develop products, food and drink, arts and crafts, trails, directories and access to producers, celebrating the local sense of place
9. **Build better links and packages between existing commercial operators** to link up accommodation, activities and places to eat and drink – particularly on walking and train routes, for events and festivals.
10. **Encourage visitors to leave the car behind** either before or during their visit; increase usage of rail routes from the surrounding conurbations, and to a lesser extent, buses; promoting itineraries, connections and routes for walking and cycling, for accessible recreation

6.04. Taking a Tactical Approach

In order to respond to these strategic aims, it is proposed that there is a shift in thinking, making the most of the existing product, partnerships and limited budgets, and playing clever in delivering the actions. What visitors want is a simple, straightforward offer. The challenge is to articulate the attractive descriptors of potential activity into something even more compelling, with some clear distinguisher experiences that you can't find elsewhere, or at least elsewhere in Shropshire, and with a clear call to action.

Visitors are generally fussier and more demanding than ever before: they are savvy online and have access to more and more information about competing destinations. They can quickly determine their value for money tolerance but what they find harder to assess is the 'value for time' impact – unless they get sufficient information about a destination that **sells up** the benefit of their making the effort to go there.

Dr Samuel Johnson had already nailed that 200 years ago when asked about the Giant's Causeway; *'Worth seeing, yes. But not worth going to see.'* We must avoid such a conclusion.

Most of the suggested tactics that follow are relevant for all visitors – the larger volume of day visitors as well as the higher spending overnighters, and not forgetting the immediate local residents. The aim is to pursue limited focused actions that can make an impact and that are driven by economic growth and quality. It is about setting processes in place now with an eye to changes in the economic situation in a few years time.

The tactical approaches are a blend of product development, marketing and collaboration based around key growth opportunities. This focuses on making an inroad to the larger main target market segments, in order to make a difference - creating a compelling experience such that they will go away and tell their friends and return to discover more. Leading with the more obvious elements will make a higher impact and help the industry to see growth, enabling subsequent smaller actions to follow on.

6.05. Opportunities and Priorities

There are myriad opportunities that NSO can capitalise on, using many of the assets for practical, sometimes subtle and maybe low key, but distinctive improvements to the visitor experience. The analysis of all the foregoing sections, especially of the key challenges, highlights the areas to be addressed in order to achieve the **strategic aims** above and thus recommends the remedial **actions** which, over time, will show impact on businesses' sustainability, on the NSO market towns and on the overall Shropshire economy.

This section now sets out the **Programme Priorities** which form the basis for the Action Plan. They are practical and rooted in the nature of the local environment and scale of businesses, in order to take many of the opportunities forward. Clearly it is impossible to do everything at once, and prioritisation is vital. However, in the real world opportunities often appear without much warning and partnerships need to be sufficiently fleet of foot to allow for this. Partnerships and funding packages will be needed for some implementation and that is also covered below. However, not everything requires hard cash; some recommendations are based on better, smarter collaborative working, exploiting what is already happening, coat-tailing on other successful initiatives/products and improving communication between operators to define and offer new opportunities.

Thus by reviewing the gaps in provision, whether the lack of identity or the issues about local knowledge within the four main 'P' challenges **(Perception, Product, Performance, Partnerships**), it has been possible to identify a relatively simple strategic statement of intent and short and fairly concise set of recommended Actions for the DDP to follow. **The Priority Programme Areas** to enhance the visitor economy form the key priorities for the detailed Action Plans that follow:

PRIORITY PROGRAMME AREAS FOR ACTION

Priority Programme Areas	**Rationale and Opportunity**
1. COLLABORATE TO COMPETE **Response to 4 Key Challenges:** Partnerships **Priority**: High **Potential Benefit to Visitor Economy:** High	Join up with others, developing local business clusters and broadening partnerships with groups sharing the same values, with the aim of bringing in more business. Achieve more yield from existing customers at large venues, building on large base of existing day visitors and making the connections to the immediate surroundings. The effective and combined efforts of the private and public sectors, community, conservation and heritage interests is essential in order to deliver key actions, get the most from limited resources and avoid duplication. Market towns need to **collaborate rather than compete directly**. Development of localised activity with direct impact and benefit must be undertaken to provide visitors with a better all-round seamless experience of the destination. **Collaborate to compete** also underpins the entire strategy and implies genuine partnership working, avoiding parochialism and seeing the destination as outsiders see it.

Priority Programme Areas	Rationale and Opportunity
2. WHO DO YOU THINK YOU ARE? **Response to 4 Key Challenges:** Perception/Profile, Performance **Priority**: High **Potential Benefit to Visitor Economy:** High	Solving the identity crisis by articulating the entire visitor offer through agreed shared key messages, values and imagery. The overwhelming need for an agreed 'personality' for the NSO area, starting from development of 'The Shropshire Borderlands' as a working tool, with clarity of offer and shared key messages is well supported. Better imagery, shared messages and 'tone of voice' in newly branded marketing of the area is vital and this strategy has gone some way to explore what that might be. Creating a brand that all can use and be proud of will complete the missing piece of the Shropshire visitor brands patchwork.
3. MEMORABLE MARKETING **Response to 4 Key Challenges:** Perception/Profile, Performance **Priority**: High **Potential Benefit to Visitor Economy:** High	Improve, upgrade marketing and PR, communication and information, creating a lead single focus, rather than diluting the message, to present the key products enticingly through a stronger campaign: market towns, natural landscape, heritage, walking, and the profile of those quality accommodation products, experiences, festivals. Strike the balance between improving communication to those already visiting other Shropshire locations and surrounding areas, with raising the profile of this part of the county to potential new audiences. Use of strong shared messages and top quality images to sell the area in immediate ways which words alone cannot do. Seamless online marketing, integration of online information and clearly defined visitor 'offers'. Productive PR and its higher editorial credibility will give more content to potential visitors as to what the area offers that perhaps other parts of the county do not and the proximity to neighbouring areas and their assets too.
4. MAXIMISE THE MARKET TOWNS **Response to 4 Key Challenges:** Perception/Profile, Product Performance **Priority**: High **Potential Benefit to Visitor Economy:** High	Up-sell and cultivate their retail, markets, hospitality, food, drink, festivals, events and heritage and maintain improvements to infrastructure. Improve weekend opening and cultural offer. In a time of increasing 'clone towns', certain markets are seeking life as it was, independent traders, local markets and specialist finds. These towns have heritage in canal history, vernacular architecture, historic characters and lively events and festivals. Building a more integrated destination with links between the towns and countryside will help visitors and towns to generate success. Creating clearer awareness of the Five Towns, each 'anchoring' the large rural core can strengthen perceptions of the visitor destination and what it has to offer. However, the towns need to be strong, work together and act like one big visitor attraction, avoiding duplication and knowing each others' strengths to cross-sell.

Priority Programme Areas	Rationale and Opportunity
5. BETTER BUSINESS **Response to 4 Key Challenges:** Perception/Profile, Performance **Priority**: Medium-High **Potential Benefit to Visitor Economy:** Medium- High	Business Improvement and Growth, creating the conditions for better delivery by supporting the industry, enhanced use of technology to reach the (potential) visitor, supporting site product development opportunities. Encourage local businesses involved in the visitor economy to take part in improvements that bring them better bottom lines in terms of turnover, profit and reduce loss of staff and enhance the performance of staff. Better skills training, increased quality levels (proven to bring higher income and spend per head) and support for use of technology are essential to help businesses compete. DDP to support enhancement and development opportunities for businesses and projects. Development of localised clusters of business support can enable the operators to learn from each other.
6. SHARE OUR SHROPSHIRE **Response to 4 Key Challenges:** Product, Performance **Priority**: Medium - High **Potential Benefit to Visitor Economy:** Medium- High	Improve familiarisation, knowledge and cross selling by all providers, to enable any visitor, day or staying to 'ask an expert' and gain ambassadorial treatment. Improving the product knowledge of the industry itself through local operators and providers. The need to guide the potential visitor to experiences and venues and interpret the opportunities to enjoy them is an area that the industry itself finds hard to articulate and promote. This programme area will concentrate on improving the knowledge of the product across the sector so that everyone is 'an NSO expert' and able to cross-sell and refer on, and recommend experiences to enjoy.
7. SURPRISING SPECIALISMS **Response to 4 Key Challenges:** Perception/Profile Product **Priority:** Medium **Potential Benefit to Visitor Economy:** Medium	Product development in niche activities and themes, e.g. literary heritage, airfields, retail, food and drink opportunities; i.e. develop and distinguish to appeal to specific interest groups. *Discoverers* and *Cosmopolitans* like to experience locations where an authentic visit can be rooted in local identity. NSO contains an array of niche potential of considerable variety. Creating suitable experiences and packages where visitors can explore these for themselves with or without an expert to hand needs developing and also offers business growth. The existing events and festivals should be built upon. They provide an alternative prime reason for visits, based around both special interest niches, as well as broader interest. Events and festivals can entice some visitors to come for a specific purpose and become returning customers.

Priority Programme Areas	Rationale and Opportunity
8. WELCOMING ALL WALKERS, HIKERS and BIKERS **Response to 4 Key Challenges:** Product Partnerships **Priority:** Medium **Potential Benefit to Visitor Economy:** Medium - Low	Join up and clarify the overall walking opportunities in the landscape, both 'soft' and more demanding, and link especially to towns (Walkers are Welcome), villages and public transport. There is a high level of short, medium and long distance walking routes and trails within the NSO as a major visitor activity. Aim to make much more of the existing network of routes and the associated events and festivals, working with commercial operators. The need is to integrate and work together to make *Walking in the Shropshire Borderlands* a lead product, visible to key target markets and better marketed as well as taken up by commercial partners Cycling trails and markets are of slightly lower priority but have good potential for growth particularly to new 'soft cycling' markets.
9. ACCESS ALL AREAS - TRAINS AND BOATS AND PLAINS **Response to 4 Key Challenges:** Product Partnerships **Priority:** Medium **-** Low **Potential Benefit to Visitor Economy:** Low	Encourage and make clear the opportunities for alternatives to the car, improve providers' attitude to sustainable transport. Aim for the area to lead in providing easy accessible options, including for those with disabilities, maximising the gentle landscapes. With limited public transport into and around the area, the car is the main means of transport. However, plenty of people do use other means, including bus, train, bicycle and on foot. It is valuable to promote that other forms of non-car based transport are available, trains are particularly well connected and link to places where visitors want to arrive, visit and stop at. Whilst much of the change needed can only be delivered by the public sector, the DDP should lobby accordingly. The disability/ less mobile market potential is considerable and benefits from expertise in the area and a gentle landscape with accessible locations.
10. LONGER LASTING, EXTENDED EXPERIENCES **Response to 4 Key Challenges:** Perception/Profile, Performance **Priority:** Medium **-** Low **Potential Benefit to Visitor Economy:** Medium -Low	Extending the length of visit by promotion of the wealth of other things to do, both during the day into the early evening dining economy, as well as extending the season, generating more repeat trips year round. A key priority noted by the Marches LEP and the England Rural Tourism Action Plan, is to encourage visitors to stay longer and not just pass through. Day visitors can be encouraged to spend a good half day and potentially consider future visits, including as staying visitors if the offer is right and the reason compelling. Encourage visits at different times of year. Business tourism and non-tourism led events at some of the bigger venues can be developed, highlighting midway location, transport routes and links to conference and business bureaux. Promoting 'The Best of' across accommodation, hospitality, through social media, online booking websites etc. would help open up the shoulder season. The 'silent Sunday' syndrome needs to be addressed especially in the market towns; unsold nights can be promoted at value rates for empty nester markets.

SECTION 7: MAKING IT HAPPEN

7.01. Taking the Strategy Forward

This strategy does not propose to set out a list of '101 projects' to be undertaken. This would be unachievable and defeat the objectives of the commissioning partners. However, the ten Priority Programme Areas include many potential actions in order to achieve the Strategic Aims. Many are about relationships, raising the profile of the visitor economy and pressing more firmly for actions to benefit the local area.

Taking this forward requires leadership and some articulate vocal champions of the importance of delivering this plan to businesses and to the County. The Destination Development Partnership and key partners need to focus on the key issues and increase their visibility. Although the DDP is frequently indicated as being the lead body on many activities in the action plan, this is not very practical as the body has virtually no resources, and help will be needed to progress these actions. That said, the DDP will only succeed in the future if it is seen to be making things happen in a positive way and thus regarded by the industry as an important body for achieving progress.

Moving forward requires buy-in to the strategy from all types of partners, not just those more obvious tourism partners, in order to secure their taking the lead on specific projects. Using the action plan, partners should seek to implement the project recommendations, drawing in additional funds, and support from a broad range of those willing to get involved. In the market towns the existing organisations, neighbourhood planning committees and town councils will be vital components of getting anything done but also beneficiaries of the resulting impact. The varied public and private sector partners already have differing degrees of involvement in the visitor economy, and it is those that have a direct vested interest which should be most supportive of taking the strategy forward. It's about the visitor economy and thus it is an economic growth activity for all. It should be embedded in the new Economic Development Strategy for Shropshire.

7.02. Who will Deliver the Actions?

The **DDP does not have the capacity** or resources to implement and deliver all the tasks set out in the strategy and action plan. The working partnerships with the two **Tourism Associations** are informal and not yet strong, but there are synergies and willingness for progression. Becoming involved in delivering actions will make that real. In past years the County had a Tourism Business Support Adviser, a resource that is much missed. More recently, the Shropshire Council tourism network fund enabled small-scale but effective activity to be delivered. The first steps need the Destination Development Partnership to meet and consider the practical implications to move the strategy forward, and to regroup issues, particularly within the first strand of Priority Programme Area 1 Collaborate to Compete.

The DDP itself should take a step back, and look at its structure, how it responds to the mandate that it was set up with by Shropshire Council and Shropshire and Telford Tourism Strategy Board (section 1.03 above). The limited resources the DDP has directly means that all Board members must be tasked to lobby in the appropriate domains. This may mean that the Board needs to be revised to be fit for purpose.

Business and organisational awareness of the DDP and its role has been observed to be poor. The organisation must rapidly present itself – as part of promoting the strategy to the local businesses and partners – and clarify what it can and cannot do. The long winded title alone (NS&O DDP) may be a hindrance – a snappier **'The Shropshire Borderlands Tourism Partnership'** or similar – perhaps helps the trade to better understand that it 'does what it says on the tin'.

For the DDP ('Tourism Partnership') to have a tangible relationship with its businesses and member organisations, it should:

- Continue to meet three times a year, with a clear structured meeting calendar, events promoted in advance
- Be responding as the voice of the sector to various external organisations and influences that have an effect upon the visitor economy – speaking up for the visitor economy, and seeking to harness any opportune partnerships or funding that may come along
- Maintain an up to date database (email) – to communicate with the sector at large. This should not be an onerous task, Shropshire Council's Tourism Team, along with both the Tourism Associations and the market town/regeneration partnerships should be able to share and build a contact base that receives e-newsletter updates and the other DDPs can share best practice.
- An annual main public forum would provide the vehicle to communicate with the industry at large - not simply Tourism Association members, and to include other organisational groups involved in rural, market town, community, heritage, access, etc. issues.

Ideally, the two tourism associations can provide additional support to move elements of the strategy forward. It is recommended that they should join officially together to **form one NSO wide tourism association, whilst retaining their separate 'chapters**' and local activities for members to feel greater local output. In return, they can apply for funding to external bodies with greater mass and membership to benefit. This may be a step too far, and take time – so in the short term, the two trade bodies should jointly sign up, not only to this strategy, but to being a closer working partnership, with an intention to support and roll out the actions where they can.

For the **enquiring public** – they are not interested in who provides the channel to information, just that it is easy to find and provides the enticement to visit and information that is sought. Therefore, the two tourism associations should focus the initial point of online promotion and presence through a stronger "The Shropshire Borderlands" web portal, channelling visitors more locally as they desire. In the same way, joint area-wide print would give a stronger identity and coverage of the range of local sites and businesses within the overall destination.

The action plan that follows is based on all the foregoing and aims to focus on what the review has indicated as priorities and most likely to deliver the aims and objectives. The first steps depend on setting up recommended **DDP task and finish working groups** in order to kick-start key actions**.** This is not required for all ten Priority Programme Areas and wherever possible use should be made of already established partnerships, especially where there are neighbourhood planning implementation groups. Some areas of work overlap, so in setting up task and finish groups and, as work progresses, it may well be possible to merge some of the suggested working groups to achieve even better synergy.

Some groups will undoubtedly evolve to become regular and ongoing, others will come together to get a particular task done and members of groups may come and go. Whitchurch and Oswestry's town tourism action plan drivers must be integrated into these groups.

Proposed working groups are:

1. **MARKETING and PR –** including online and offline (print etc.), generating stories and identifying future opportunities

2. **MAXIMISING the MARKET TOWNS -**re-establish and re-use the Market Towns Forum and/or the existing activities through the Market Towns Revitalisation Programme group
3. **BUSINESS and PRODUCT DEVELOPMENT -** drive forward skills, quality, training improvement, with clear links to local business chambers and economic development fora, and generate visitor itineraries, niche/specialisms, updating the Share Our Shropshire programme

Additionally, but not needed as a formal task and finish group is the opportunity to get the existing **WALKING AND CYCLING** partners to lead off activities across the NSO area, building on Walkers are Welcome, festivals, Rights of Way, Ramblers and commercial operator opportunities.

In order to build on the momentum from this strategy, it is recommended that a part time **Visitor Economy Project Coordinator** post is created to coordinate and implement the priorities. Ideally, hosted by the DDP partnership for at least 2 years, and unlikely to be in post before April 2013. The part time post holder would drive forward the action programme clusters, business support network, marketing packages of activities and venues, encouraging the desired product development and improved communication through up to date databases and using social media effectively at little or no cost. Funding for the post could be supported through a mix of Shropshire Council, Northern Marches LEADER, Rural Development Programme and Market Towns Revitalisation Programme resources, backed up with some private sector/Tourism Association support in cash and kind, which could include hosting the post.

There is only a minimal budget that they are likely to be able to manage, the position is more about an extra pair of hands on the ground to build the linkages, push projects forward and be a voice of support to the DDP team. In the overall scale of things this low cost initiative (0.5 part time) would pay dividends and create critical mass by helping to get the projects underway, following on from initial beating the drum for the industry by the current DDP Board. In the Action Plans, many project areas that the Visitor Economy Project Coordinator could undertake are set out, indicating the added value of these additional experienced hands.

Working alongside the DDP, the task and finish groups, local and county business chambers, heritage, walking and countryside organisations, the part time Project Coordinator would have a key role in generating private sector support, to help projects happen quickly to deliver returns to businesses on the ground. They could also assist in funding applications for capital and revenue projects and be the local face of the visitor economy. Such a post would also help Shropshire Council in delivering its localism agenda.

7.03. Funding Opportunities

With only very limited budgets and staffing, it will be essential to seek additional funds in order to put a realistic package of support together. Funding opportunities are limited at a time when national and local programmes and budgets are being closed or reduced, including core funding from DEFRA and local authorities. Potential funds include:

- **Natural England and DEFRA/ Rural Development Programme England** provide routes to private sector growth investment
- The **Forestry Commission** West Midlands is also willing to develop commercial tourism opportunities in the county
- **Natural England's P4C – Pathways for Communities** is a new programme for communities to develop walking and other routes including cycling, bridleways that link visitor economy products like pubs, village shops, post offices etc.

- The Marches **Local Enterprise Partnership** - support for specific needs of the rural area. Local businesses, Councillors and Officers must call for support towards actions that can generate employment in NSO rural areas especially when led by the private sector
- The **Shropshire Sustainable Rural Transport Plan** is already providing potential funding support towards some of the public transport and access initiatives and there is still scope to allocate funds.
- The **Northern Marches LEADER Programme** supports economic regeneration in rural areas in south Cheshire and virtually the whole of the north Shropshire and Oswestry area until the end of 2013. Much of the budget is already allocated but there may be an opportunity for some end of programme quick win projects to mop up remaining budgets or capitalise on under-spend elsewhere.
- Working with **Shropshire Wildlife Trust and** other specialist nature bodies would also allow for specific funded initiatives to be bid for, as well as working collaboratively on the tourism facing elements of the Meres and Mosses project
- **Shropshire's Start Up Fund** and other small scale support funds via local area joint committees
- The **Market Towns Revitalisation Programme** has already identified many local infrastructure projects that are based around the visitor economy and with schemes and proposal logged that require further development, which could now be aligned with this visitor economy strategy. In the Oswestry area there are grants available for upgrading B&B accommodation.
- Specific schemes can potentially tap into funding from other organisations such as the **Sports Council, Heritage Lottery Fund, Big Lottery Fund, Arts Council England, Primary Care Trusts;** developing healthy, recreational, heritage, arts, cultural, and community benefiting projects, which can also attract and be used by visitors.
  - Gobowen, St Martins and Weston Rhyn have already succeeded in gaining BIG Lottery local money of over £1m from the Big Local Trust programme that will enhance the local place making
  - Sports, Health and Arts funding can support projects that have a primary objective of providing local people with healthier, active, better quality lifestyles, recreation, walking trails, arts facilities, events, etc. – but which add to the breadth of product and ability for visitors to discover more about, and explore .
- The impetus of additional domestic **tourism marketing from VisitEngland**. A £3 million boost has been made to support VisitEngland's domestic tourism campaign, to ensure the full potential of the Olympics, the Diamond Jubilee, the Cultural Olympiad and all the events of 2012 are realised by the tourism sector across the country. A major joint marketing campaign with industry will promote stay in the UK tourism and NSO businesses should look to learn from what's on offer
- **VisitEngland** has successfully bid for additional funding from the **Regional Growth Fund (RGF)** to be used on a three-year project entitled, 'Growing Tourism Locally'. A key part of the project will be a national campaign aimed at inspiring Britons to take more short breaks and holidays at home and in doing so grow jobs in the tourism sector. In addition to targeted activity in areas needing to create employment there will be a series of thematic campaigns focusing on countryside, heritage, coastal and business tourism.
- A **local visitor economy development fund** should be considered, with financial support, and management interest from the private sector, match funding public sector grants. Leading businesses, landowners and the CLA, employers engaged in the visitor economy would put into a project development pot. This would support action plan projects and provide match funding to draw down from external funding agencies such as BIG Lottery Fund or HLF. The set up would seek to avoid complex private-public sector partnership

mechanism, whilst remaining transparent and for the benefit of the greater area, not individual funders.

7.04 Communication with the Sector and Increasing Knowledge

Having now begun a dialogue with businesses involved in the visitor economy, it will be vital for the DDP to maintain an ongoing relationship with them. Communication should focus on their interests as businesses managing the product and environment that visitors come into and use, and delivering services and support to visitors. Key Recommendations are:

- To begin the discussion with the business involved in the visitor economy about the priorities set out in this strategy, not least the need to work together, to agree an identity that gives stronger underpinning to the area and to prioritise actions that can quickly make a difference and begin to tangibly demonstrate that the strategy 'has legs'
- DDP to organise an annual 'Tourism Forum' to get the widest range of businesses engaged and update progress on delivery of action. The two tourism associations would present their activities and what level of success achieved. Local businesses, tourism officers and countryside organisations would share updates, best practice and engage businesses and communities
- Organise six monthly 'discover and enrich yourself' local events at different hosting venues, to increase product familiarity and know how. This is expanded in the Action Plan
- Provide ongoing communication with those in the visitor economy from a range of professional staff and advisors, including business support, planning, landscape and heritage advice. Working with Shropshire Chamber's training programme, hold thematic workshops covering issues pertinent to the sector: e.g. subjects to include conversion of properties for visitor businesses, social media, increasing food and drink distribution and supply chains to outlets, impacts of visitors on heritage sites, arts and events advisers, etc.

7.05. Longer Term – Build Relations with other Tourism Bodies in bordering areas

The DDP should forge even more productive links with the neighbouring areas of Cheshire, Staffordshire, Wrexham and Powys. Meeting, listening and sharing experiences between these destinations will add value for businesses and the public sector too, especially via the Pontcysyllte World Heritage Site. Cheshire has already expressed willingness at look at thematic and other product development and other joint opportunities. Involving these areas in projects and sitting on some of the groups – the DDP or task and finish groups - would strengthen working relationships.

Working with the Meres and Mosses can also extend its reach into Cheshire through Natural England's additional Meres and Mosses project and could work with businesses to complete the development of themed breaks and overnight visit options. The Shropshire Wildlife Trust's *Meres and Mosses LPS* HLF Project is also establishing unifying brand concepts and messages and will be developing and implementing an engagement strategy. It might be possible to generate bookings specifically for the niche scientific and research markets across the whole area.

7.06. Improving Market Intelligence

As with any package of activity, there is invariably a requirement to better understand aspects of the customer and business base.

- It has been noted how there is now no comprehensive survey of visitors across the NSO area; of their origins, demographic characteristics, preferences, desires for improvement, spend behaviour, etc. A dedicated **Visitor Survey**, across at least six months from April/Easter to October half term would provide insight into the variety of day and overnight visitors for leisure and visiting friends and relatives. With little resource this could be achieved on a self completion basis through accommodation and attractions, such as the Staffordshire DMP does. There would have to be caveats on the numbers involved to ensure statistical validity

- It may be that the HE sector would be willing to help (Wolverhampton University, Harper Adams and the Ironbridge Institute)
- In both the five market towns *and* the surrounding market towns (such as Nantwich, Shrewsbury, Chirk, Welshpool, etc) a **visitor survey** would ask residents and visitors their attitude to and awareness of the NSO towns and identify areas for improvement and highlights to promote more visitation and value from it
- In association with Shropshire's economic development department, business support and rural regeneration agencies, a comprehensive **Business Survey** of 100+ enterprises engaged in the visitor economy in the NSO rural area should be undertaken. This will also allow for some monitoring of impact of this strategy and would be of interest to other agencies such as DEFRA and the Rural Development Programme.

7.07. Conclusion

North Shropshire and Oswestry is host to a rich legacy of natural, cultural and historic gems, set within a landscape that has been lived in and worked for millennia and which provides the backdrop to visitor activities today. A growing consensus supports the sensitive enhancement of the visitor economy, as it supports local jobs and provides services for local residents. Taking the action plan forward will need to balance the growth of local businesses and employment with the tranquillity of the area and the quality of landscapes that people live in. Many practical opportunities simply require greater partnership, coordination, knowledge of the product and collaboration to make more of existing businesses and visitors, by linking **places, providers and products**. Any suggested initiatives are based upon realistic levels of funding and support, using the potential for local and national funding programmes to generate fresh activities. A more outward looking, knowledgeable and welcoming approach will encourage visitors, generate greater enjoyment, gain repeat business and help all to have a better appreciation of the landscape, heritage, festivals, food and drink, culture and lives of **THE SHROPSHIRE BORDERLANDS.**

The detailed Action Plans to deliver the ten Priority Programme Areas follow.

SECTION 8: ACTION PLAN

'A good idea belongs to no-one' Albert Einstein

8.01. Notes on the Action Plan

The following Action Plan is based on all the foregoing and it aims to focus on the priorities most likely to deliver the aims and objectives. A five year plan 2012-17, with focus on the first three years is proposed.

Ideally the DDP should set up the recommended **DDP working groups** harnessing the skills of members and associated organisations. The recommended groups are noted within the delivery column of the Action Plan:

MARKETING and PR	(identified as MPR in plan below)
MAXIMISING the MARKET TOWNS	(identified as MMT in plan)
BUSINESS and PRODUCT DEVELOPMENT	(identified as BPD in plan)
With use of existing WALKING and CYCLING networks	(identified as WAC in plan).

In the Action Plans, many project areas that the proposed Visitor Economy Project Coordinator could undertake are set out, indicating the added value brought by creating an additional set of experienced hands to move projects forward. Without this role, some elements of the action plan are likely to take longer to achieve, or will not be achievable with existing capacity.

The document produced here and the detailed Action Plan should not be regarded as fixed in stone. As activities evolve, are delivered and opportunities arise, the table should be updated, and the document regarded as a dynamic tool, not a fixed checklist.

8.02. Partners to Deliver

The Action Plans set out those projects that require an additional resource to make it happen – in the form of the added activities and benefits that would arise from a **Visitor Economy Project Coordinator**. Where possible we have indicated the other sources of help, expertise and funding potential, as well as timescales for the activities.

Additional to the tourism bodies and associations are the networks and groups that have expertise, members, role and/or intelligence and information relevant to the NSO Visitor Economy**:**

Shropshire Council's Economic Development and mentoring scheme	SC
Shropshire Council's Local Joint Committees	LJC
Shropshire Tourism	ST
Country Landowner's Association	CLA
British Innkeepers Association	BIA
Shropshire Wildlife Trust	SWT
The Ramblers (Shropshire branch)	Ramblers
Walkers Are Welcome Groups	WaW
National Farmers Union	NFU
Shropshire Hoteliers Group*	SHG

Telford and Shropshire Conferences *(Business tourism org)	TSC	
Walford and North Shropshire College	WNSC	
Derwen College for the Disabled	DC	
Disability Holiday Information Service	DHIS	
Women in Rural Enterprise (run by Harper Adams University College)	WIRE	(HAUC)
National Trust (Shropshire)	NT	
Network of Women (SCTI sub network)	NoW	
Network with Style	NWS	
4Networking		
Ladies in Business (Lloyds TSB and other sponsors)		
Rural Hub (old AWM initiative related to farming)		
Shropshire Business Partnership (via Shropshire Council)		
Telford Business Partnership (via Telford Council)		
Creative Shropshire		
Made in Shropshire Group		
Business Networks International (Shropshire wide)	BNI	
Shropshire Chamber of Commerce and Enterprise	SCE	
Affiliated Chambers (to the above) and some unaffiliated Local chambers		

* run by the Tourism team at Telford and Wrekin Council across the county

THE SHROPSHIRE BORDERLANDS STRATEGY ACTION PLAN

Strand No.	Action	Yr 1	Yr 2/3	Delivery by	Indicative £Costs Yr 1	Performance indicators
1	**COLLABORATE TO COMPETE** **Partnership Working**			DDP		
1.1 **DDP Working Groups**	• Self review membership of DDP Board to ensure representation for all VE sectors. Remodel into small, strong Board charged with delivery of this plan. • Establish the 3 integrated task and finish working groups as identified, agree action plan delivery, task and finish, reporting mechanisms, leadership and membership of each group to ensure action is implemented and clarify what can be expected from public sector: e.g. LJCs, Tourism Officers, Countryside officers, funding team at SC, etc • Begin apportioning and developing Key Tasks			DDP Board to lead on setting up groups Working Groups to then make progress	£0 at this stage	DDP established as lead for sub-county area Improved clarity of roles and purpose Strengthened visibility of visitor economy
1.2 **Funding**	• Work towards selecting agreed projects for which applications could be made using this plan. May need small subgroup on funding as a result – Community Regeneration officers/SC to facilitate funding bids as per section 7.03 of this report – especially in relation to major product development such as Montgomery Canal		*Project Officer*	DDP Board SC to assist	£0 at this stage	Funding generated
1.3 **DDP as organisation**	• Consider merger of OBTA and NST to form one tourism association – (leaving separate local 'branches' if desired still) • Invite representatives onto DDP board from Cheshire, Staffordshire, Wrexham and Powys (at least on occasional basis)			DDP Board	£0 at this stage	Action oriented meetings focused on delivery of plan and negotiation. Lobbying and future resourcing

Strand No.	Action	Yr 1	Yr 2/3	Delivery by	Indicative £Costs Yr 1	Performance indicators
1.4 **Signage audit**	• Audit of signage across NSO – to make recommendations for improvements once identity/ branding agreed			DDP board working with SC Highways	£3k year 2	Audit undertaken, recommendations produced
2	**WHO DO YOU THINK YOU ARE?**			MPR Task and Finish		
2.1 **Solving the identity crisis**	• Develop branding using guidance suggestions from this strategy as baseline • Develop agreed set of shared messages accompanying branding and protocols for use • Prepare new photographic portfolio 'The Best of'… that all can use free of charge • As part of this, create a more attractive, dynamic online 'umbrella' portal with much needed social media linkages, itinerary building options and the vital associated Search Engine Optimisation, for all NSO-related websites • *Urgent Year 1 progress to achieve summer and autumn season photography for brochure next year*	*Photos needed season-al*	*Spring photo-graphs*	DDP MPR Plus external professional expertise	Probably the single largest cost but with greatest long term benefit c £15-20k	Create longed for 'persona' and sense of shared identity Improved perception Businesses able to use without charge
3	**MEMORABLE MARKETING** **Marketing and Market Intelligence**			MPR Task and Finish		
3.1 **Set up Memorable Marketing and Productive PR Group**	• Ensure Marketing and PR Group avoids parochialism, political interference or vested interest. Group must: • Co-ordinate and implement the results of the branding activity at 2.1 • Deploy the new Marketing Strategy and this plan in tandem to create the 'new destination', 'tone of voice' and 'feel', begin to make a difference straight away to get business buy in • Encourage all operators and providers to use brand and shared messaging and imagery and avoid duplication • Create credible editorial coverage on and offline, see 5.4			MPR SC BPD	£5k minimum	Begin to make changes in marketing tone Increased member participation/ payment into campaigns

Strand No.	Action	Yr 1	Yr 2/3	Delivery by	Indicative £Costs Yr 1	Performance indicators
	• Explore income generation opportunities: new products, website advertising, commercial sponsorship, affinity deals or sponsored media - working with other brands e.g. local big name commercial partners who may be willing to help, Müller, Grocontinental and Welsh Water at Oswestry • Work with tourism groups in Whitchurch and Oswestry on their town/area identities and marketing					
3.2 Priority markets	• Encourage use of shared branding presence with quality imagery and clear propositions, through all networks • Use new branding/messages targeting Priority Segments *Discoverers, Traditionals and Cosmopolitans* : staying visitors, day visitors, group travel, commercial travel trade • Use a shared template for 'offers' to identified markets and use by PR and marketing media, online and offline. • Co-ordinate advertising in local printed media etc. to present a branded, unified, cost effective higher profile offer at Bank Holidays and other seasonal promotions • Market test and review		*Project Officer*	MPR BPD	£10k Research costs Plus in-house review	Fewer marketing products delivering same or better collective ROI More cross boundary links Plans produced KPI monitoring
3.3 Marketing themes	• Develop ways to personalise the messages for target markets (year 2) • Review themes again after three years			MPR SC	£5k	Review in Yr 4 Improved online KPIs
3.4 Increase awareness of NSO (The Shropshire Borderlands) through editorial on and offline	• Generate good stories for media and co-ordinate style and messaging across NSO – become the point of dissemination. • Use/exploit existing PR by all partners, improve effectiveness and increase investment • Develop greater impact and synergy with topical news items, calendar events, and more links to NSO products, people and experiences. • Encourage greater PR usage, social media, skills amongst membership		*Project Officer*	MPR Work with ST, Shropshire Star Attractions Group, other attractions, PR opportunities and resources	£0 at this stage	PR coverage, AEV and PR value.

Strand No.	Action	Yr 1	Yr 2/3	Delivery by	Indicative £Costs Yr 1	Performance indicators
3.5 Online and social media	• Continue to improve and develop look and functionality of website(s) especially itinerary building, user generated content and key word/theme searching, potential for time-limited PR opportunities e.g. anniversaries, calendar events, festivals, new developments, topical news, TV coverage/ adaptations, national stories, celebrity endorsements. • Increase personal and user generated content recommendations e.g. 'My Shropshire Borderlands' • Ensure all the NSO visitor products are featured on the Welsh managed WHS website/map etc. • Work with Staffordshire, ensure their maps show the Shropshire side of boundary visitor facilities, town/ villages • Monitor website data, statistics, effectiveness and impact		*Project Officer*	MPR	£5k website improve-ments	Web KPIs, visits, views, downloads, brochure requests and bookings 'followers'
3.6 Print	• Review current impact then produce effective print matched to online imagery, purpose, product and person but reduce duplication and target better. • Ensure all print is available as PDFs for web use			MPR OBTA/NSTA Partners e.g. SSAG	Review current budgets	Take up, conversion to bookings, advertising revenue
3.7 Food and drink	• Work with food and drink providers to create better online profile, enticing offers and incentives linked to rest of sector eg local markets, days out, attractions: Improve the Shropshire Tourism food and drink website to benefit and give weight to the NSO product			MPR Local Chamber HEFF CAMRA ST	£0 at this stage	PR coverage, advertising revenue
3.8 Expand membership of the TA(s)	• Develop and market membership expansion – streamline and add more benefits to the membership offer and develop a simple sell linked to potential creation of one overall TA (merged OBTA and NSTA **organisationally** whilst retaining local activity groups) • Promote the membership offer through incentives, PR, peer recommendation, ambassadors, tourism officers and target new business sectors linked to income generation			MPR and BPD groups TAs LJCs Chambers	£0 at this stage	Membership numbers Increased membership in wider sectors

Strand No.	Action	Yr 1	Yr 2/3	Delivery by	Indicative £Costs Yr 1	Performance indicators
	• Simple survey of non-members as part of new plan and offer (year 2)			TA		
4	**MAXIMISE THE MARKET TOWNS**			MMT Task and Finish		
4.1 Develop Visitor Economy remit within existing partnerships	• Use existing structures in market towns/neighbourhood planning or create sub group of MTRP/ former Market Towns Forum (Northern branch), or use Portas Bids 'Town Teams': Set leads and role of relevant town groups to avoid duplication to set up tourism network for the five market towns; The *Shropshire Borderlands Market Towns* • Use the priorities from the two town plans for Whitchurch and Oswestry and from which others can follow to create their own model • All sectors to feed in relevant aspects of visitor management, infrastructure, environment, visitor services and identify shared needs , e.g. research, and operate a 'clash calendar' to maximise events across all 5 towns • Set up mystery shopper cross-towns programme to benchmark experience specifically, if informally, and feedback/link to Share Our Shropshire below at 6		*Project Officer*	MMT group BPD network Plus others e.g. Local Agenda 21 groups, Footfall Oswestry, DHIS, Better Welcome Groups,, Festival Groups and arts and heritage groups	£0 at this stage	Levels of new participation Impact of activities on towns
4.2 Market Towns Marketing	• Agree use of branding from 2 above, as appropriate to towns online and offline • Develop and distinguish key offers in each town • Agree cross marketing • Invite relevant local education providers, Gobowen hospital, major businesses to play a role and help provide relevant product to their various user groups • Establish retailers/markets forum across all market towns to market their offer collectively • Markets promotion – distinguish the offer and cross sell		*Project Officer*	MMT With PR And LJCs	£0 at this stage Yr 2/ 3 spend based upon use of existing town activity budgets, and new MTRP bids	Take up of new marketing, identity and promotion approach

Strand No.	Action	Yr 1	Yr 2/3	Delivery by	Indicative £Costs Yr 1	Performance indicators
	• Invite proposals for specialist markets to operate on Sundays to animate towns and avoid the 'silent Sundays' syndrome so damaging to the visitor economy • Encourage retailers/restaurants to open on Sundays and between 5-7pm on other days • Encourage supporting animation and activity such as buskers, street entertainers, parking incentive/ voucher discounts					
4.3 Product and access	• Public realm improvements through planned MTRP plan and monitor and assess further refinement e.g. signage audits as per Oswestry and Whitchurch town plans • Consider range of public realm joint needs: o E.g. sustainable floral schemes/joint buying, linking to the gardens/ gardening theme o Possible awards scheme linked to Better Business o Use the overall improving walking routes linking towns and Walkers are Welcome status o Signage audits/joint purchasing o Present the retail specialism as total joint offer o Identify Business support e.g. Market Drayton o Canalside/waterside developments eg Ellesmere/Whitchurch marina • Public/green transport o Lobbying – bus services on Sundays and the vital Cambrian railway linkage for Oswestry o Provision of electric bike hire, 'dolmus' style taxis between towns		*Project Officer*	MMT group SC Town Councils etc	If linked to the MTRP, many £10k's in each town and potential for further bidding	Bidding to programmes for product/ access projects Deployment of investment
4.4 Tourist information	• Self review the role and remit of the current TIC providers and clarify any new opportunities or ways of working in the delivery of visitor services • Research new opportunities for 'gateway' tourist			MMT	£0 at this stage	TIC enquiries Numbers using new routes to TI

Strand No.	Action	Yr 1	Yr 2/3	Delivery by	Indicative £Costs Yr 1	Performance indicators
	information provision including any new sites in towns e.g. retailers • Ensure TIC feed in from and to visitors and up to DDP working groups • Present information in line with themes as far as possible • Include all TIC staff in all familiarisation work					Research outcomes
5	**BETTER BUSINESS** **Business Improvement and Growth**			BPD Task and Finish		
5.1 **Formalise relations with business partners**	Establish visitor economy business group works with local chamber/SC economic development /existing network groups with remit to : • Identify new business opportunities including Business Tourism, Meres and Mosses project etc • Generate more business from existing major events in area • Follow up the opportunities for cross boundary working with Marketing Cheshire, Staffordshire and Powys esp on skills, quality and training. • Identify skill needs e.g. social media, customer service, local food sourcing and quality, marketing • Establish industry Business Improvement programme to deliver locally • With BPD and Shropshire Chamber industry encourage local businesses to take up specific social media training			BPD TSC SCTI Local chambers SC mentoring scheme HEFF Müller Colleges	£0 at this stage	• Improved occupancy • More business events/involvement • Raised standards • More businesses inspected accredited • Revitalised Tourism associations
5.2 **Networking**	Organise 'must attend' networking events to boost local engagement and spread know how		*Project Officer*	DDP/BPD	£2k	Events held, attendances and recruitment
5.3 **Awards**	Consider setting up trade awards to raise profile and quality (expensive), so more practical to strengthen support and encouragement for existing award scheme such as Shropshire Star		*Project Officer*	BPD OBTA/ NSTA	£2k	Quality increase Participation

Strand No.	Action	Yr 1	Yr 2/3	Delivery by	Indicative £Costs Yr 1	Performance indicators
5.4 Communi-cation	Agree a shared database/social media mechanism for regular and improved communication across NSO industry sector – including those not always traditionally taking part – e.g. retailers, pubs, etc			BPD Networks	£0 at this stage	Improved contacts
5.5 Research	• Carry out a simple low cost 'how's business?' e-survey in partnership with local chamber • Actively encourage TA accommodation members and non members to provide specific occupancy data by taking part in the SC funded occupancy survey			BPD SC OBTA/ NSTA	£1k	Increases in business profitability
6	**SHARE OUR SHROPSHIRE BORDERLANDS** **Knowledge, Familiarisation and Communications**			BPD Task and Finish		
6.1 Sharing Sessions	Improving sector's own knowledge and cross promoting each other: • Offer and attend free familiarisation visits to local attractions/towns • *Sharing Our Shropshire* type sessions – theory plus trips around local area • Provide 'masterclasses'/speakers to tourism and other local organisations • Better display of local leaflets and more reciprocal website links and cross selling • Mystery shopper programme by businesses to reciprocal establishments • Consider a 'partner card' e.g. *Shropshire Borderlands Guest Card* for businesses to be able to visit colleague attractions, available as a result of joining tourism association and/or attending Share Our Shropshire programme		*Project Officer*	BPD	£2k for transport / venue costs	Stronger knowledge of own product and ability to recommend
6.2 Communi-cations	Develop simple communication system between partners to cross sell, refer on business opportunities Use 2.4 above shared database		*Project Officer*	BPD DDP	£2k	Part of broader better information flows

Strand No.	Action	Yr 1	Yr 2/3	Delivery by	Indicative £Costs Yr 1	Performance indicators
6.3 Develop visitor itineraries	Suggested itineraries/mini-packages, as a result of all the foregoing and niche offers for MPR group to promote on and offline via Shropshire Tourism and all other customer facing media.		*Project Officer*	BPD, MPR ST, Sshire Gold, DHIS, Sshire for Groups	£5 for apps and social media	
7	**SURPRISING SPECIALISMS** **Product Development**			BPD		
7.1 Developing the Distinctive	Teasing out suitable products and packages for niche and specialist visitor opportunities. Some may develop from niche to mainstream if successful. Using the following themes as a starting point to develop the offer for visitors in the key markets and specialist groups (aficionados) and use local expertise both to engage them in the visitor economy as well as to enhance: • Meres and Mosses • WWII Airfields heritage • Churches and church yards 'God's Acre' • Forthcoming anniversaries:- plan ahead, local links, events • Heritage railways and Cambrian connections • Wilfred Owen/WWI 2014. Willingness of Ironbridge Gorge Museum to work with Oswestry for Wilfred Owen/ Oswestry 2014 exhibition at Ironbridge. 1918 commemorations - Owen's death in Northern France. Links with the French Wilfred Owen Society and Museum. • Literary links / authors : Barbara Pym, Lorna Sage *et al* – festivals/ arts productions/ TV dramas/competitions linked to Festival of Words and others • Famous Folk (including Bob Marley's dad etc) • Family history/ genealogy tourism • Angling/water based activity /canoeing etc • Equestrian, riding, stables/racing and specialist associated retail and other products		*Project Officer can supp-ort some*	BPD MPR Working with specialist groups including SWT, IGMT, WaW, Cambrian Railways. Toby Neal of Shropshire Star re Airfields	Each on own partnership merits. Could be several £'000s	Take up of campaigns, press coverage Development of small packages, itineraries by the industry Increased visitor numbers at specific venues

Strand No.	Action	Yr 1	Yr 2/3	Delivery by	Indicative £Costs Yr 1	Performance indicators
	• Celebration, reunions and wedding locations • WHS links to IGMT • Possible William Emes Gardening Trail, other gardening, experts (2 RHS linked gardens) • Antiques, architectural salvage, collectibles • Specialist markets e.g. vintage, books, art • Specialist suppliers and retail e.g. guns, specialist food production, farming, industrial tourism e.g. tours of Muller? • For maximum gain, suggested itineraries and experiences should try to include both paid for and free experiences and accommodation • Some development of products may be eligible for external funding e.g. HLF's *All Our Stories* etc. • Feedback through SHARE OUR SHROPSHIRE plus Marketing, PR and Market Towns groups •					
7.2 **Food and drink develop-ment**	Actions to include: • Tea Shop Trails, online, print • Picnic products and hampers local supply in outlets as NSO is good picnicking country • Raise profile of local specialist products e.g. sausages, cheeses, damson related products like Damson Gin, real ales (both of these as at Market Drayton) as part of character of the area • Modernise Gingerbread theme -consider humour along lines of a possible ***Festival of Ginger*** including people and products, art, retail, shop windows etc? *Extreme Ginger* • Examine the previous Savour the Flavours project (DMP project 2010) audit of food and drink and consider any scope to develop new products (gingerbeer), new dishes –		*Project Officer to sup-port*	BPD Fordhall Farm HEFF SC	£5k	New linked stronger profile gazetteers, trails, etc Higher profile of food/ drink in county and regional promotions

Strand No.	Action	Yr 1	Yr 2/3	Delivery by	Indicative £Costs Yr 1	Performance indicators
	e.g. cheese platters – make more of it without overselling or over promising. Work with NT properties					
8	**WELCOMING all WALKERS, HIKERS and BIKERS**			WAC network		
8.1 **Bring together information clearly in one strong place**	• Bring together in one 'place' (www.shropshirewalking.co.uk) all walking product and opportunities including canal towpath routes, 'railway walks', disability accessible routes –integrate public/ private sector information, all walking routes on line downloads • Link walking and related festivals, routes and links to market towns online and offline • Invest in quality SEO and better social media with links to videos, podcasts, downloadable routes and maps as per Marketing above • Work with commercial operators already identified as providing walking breaks • Cross sell with other WaW products and other festivals elsewhere in Shropshire, especially the Shropshire Hills AONB • Create 'expert guide' expertise group – explore opportunities for 'book a walking guide' for 'soft' markets, new walkers, and maximise existing NHS programmes now supported through The Ramblers		*Project Officer*	WAW SC Ramblers DHIS NHS Sustrans	£5k for SEO etc	Reduced duplication Stronger web and print presence
8.2 **Increase walking event profile**	• Maximise and work with the major walking and cycling **charity fundraising** market – offer specialist help to those developing Marathons, half marathons, etc e.g. ' The Five Towns Yomp' or the Mercian March, King Offa's Trek etc – and for 2014 a possible commemoration fundraising event for one of the army charities and linked to Wilfred Owen via			WAW SC Ramblers	£5k	Growth in market Business growth in accommodation etc

Strand No.	Action	Yr 1	Yr 2/3	Delivery by	Indicative £Costs Yr 1	Performance indicators
	Shrewsbury, ending Oswestry • Arrange a one day event for all interested in maximising walking and cycling routes from visitor economy/DDP – invite speakers from commercial operators such as HF Holidays now with base at Church Stretton, Wheely Wonderful Cycling based in South Shropshire and customers who have used NSO walking products to get visitor viewpoint • Aim for more coverage in 'soft walking' or 'soft cycling' travel media via PR group e.g. family markets. Hardcore hikers already know their territories but if there's new product will revisit					
8.3 Assist businesses to under-stand the value and invest in the opportunity	• Promote and encourage walking and bike-friendly accommodation/pubs and other venues, bike racks/dry rooms etc • Grow businesses capacity: assist accommodation for walker/cycling welcome and create investment partnership/ funding access to invest on sheds, drying rooms, trader awareness etc • Develop walking/'sense of place'/local know-how training sessions for local businesses – how to promote and market walking and walking breaks • Ensure walking and cycling routes are linked to accommodation, food and drink locations • On Land's End to John O'Groats route - possible loyalty return incentive programme? • Walking for Pleasure; friends groups, young peoples' organisations (e.g. Scouts/Guides), corporate businesses (e.g. Wildlife Trust's guided Wrekin walks for corporate) • Maximise landside commercial opportunities of links to canal-side walkers, boat users, cyclist etc working with		*Project Officer*	WAC ST Walking with Offa Canal and River Trust	£5k	Business growth in accommodation etc Business investment into facilities and support

Strand No.	Action	Yr 1	Yr 2/3	Delivery by	Indicative £Costs Yr 1	Performance indicators
	Better Business and increase spending opportunity for these markets • Consider electric bike hire opportunities, charging points, routes • Identify/ create more bike hire opportunities at visitor venues using best practice from elsewhere					
9	**ACCESS ALL AREAS - TRAINS AND BOATS AND PLAINS**: Walkers, Talkers, Hikers, Bikers			DDP		
9.1 Strategic lobbying for major connections	Make THE SHROPSHIRE BORDERLANDS known for its good facilities and seamless information • Lobby for Oswestry rail link/Cambrian Railways (DDP) • Support Montgomery canal restoration, marina development at Whitchurch and improvements at Ellesmere (DDP) • Retention of commitment to walking routes development by SC, work more closely with Ramblers, Canal and River Trust • Lobby/plan for Sunday bus service improvements		*Project Officer*	DDP SC transport and highways, Canal and River Trust Railway Cos. Sustrans	£ 0 for lobbying Possible bid for help from Prince's Countryside Fund	Better connections for residents as well as visitors
9.2 Product improvement and integration	• Work with commercial train operators to create more facilities at NSO stations for visitors and opportunities for others to build on e.g. 'Railway walks' and cycle hire/electric bike hire • Aim to find funding to promote NSO product in conurbation hubs on train line • Support the Disability Holiday Information Service to provide the level of activity it previously had before lower funding in order that NSO can excel in this provision for less mobile markets • Maximise landside commercial opportunities of links to		*Project Officer*	Railway Cos. Network Rail DHIS Waterways Trust	£5-£10k	More promotional materials at conurbation stations Increased activity using rail, bus, canal staring points

Strand No.	Action	Yr 1	Yr 2/3	Delivery by	Indicative £Costs Yr 1	Performance indicators
	canal-side walkers, boat users, cyclist etc working with Better Business (BB) and increase spending opportunity for these markets					
10	**LONGER LASTING, EXTENDED EXPERIENCES**			MPR		
10.1 Create reasons to want to stay longer	Extending visits and season will to some degree begin to happen organically as a result of all the foregoing The following are medium term specific actions **for all groups** and will test the new communications and marketing structures: • Identify the specific venues, experiences and itineraries that address bad weather periods, both wet and cold but dry in winter and shoulder periods. Some may emerge from 9 above – specialisms • Use template to create sense of style and approach • Identify best ROI for appropriate extensions of festivals, changed dates to maximise inside events or venues or commemorations • Work with National Trust to link experiences with the leading Erddig and Chirk Castle sites, linking with accommodation and events • Work with specialist/expert groups to explore possible private visits to places not normally open to the public e.g. gardens, houses, businesses • Stress value for time as much as value for money			MPR Private sector SC TAs	£0, within marketing budgets	Economic impact, monitoring of changes Increased spend at businesses Clearer communication about different site opportunities to remain longer, whatever the weather

8.03. Cross Cutting actions

From the detailed activities set out there are several **cross-cutting actions – which can offer most immediate impact.** Each group below contains actions from several of the Priority Programme Area actions and requires proper partnership working. These reflect particular areas of activity that should be delivered early on, in order to begin to make a tangible difference to the presence and benefits of tourism across THE SHROPSHIRE BORDERLANDS.

1. RESOLVING THE IDENTITY

- Develop and test brand identity
- Co-ordinate and implement the results of the branding activity
- Develop branding using guidance suggestions from this strategy
- Develop agreed set of shared messages accompanying branding and protocols for use
- Prepare new photographic portfolio 'The Best of'… that all can use free of charge, undertaking new high quality photographic shots during summer and autumn 2012
- As part of this, create a more attractive, dynamic online 'umbrella' portal with much needed social media linkages, itinerary building options and the vital associated Search Engine Optimisation, for all NSO-related websites.

2. GENERATE MORE VALUE

- Assist businesses to understand the value that comes from the visitor economy and invest in the opportunity
- Cross sell and generate more business from existing major events in area e.g. Oswestry Showground, Cholmondely Castle, neighbouring counties, World Heritage Site
- Follow up the opportunities for cross boundary working with Marketing Cheshire, Staffordshire and Powys especially on marketing, skills, quality and training
- Bring together walking and cycling information clearly in one 'go to' place, building on www.shropshirewalking.co.uk
- Encourage retailers/restaurants to open on Sundays and between 5-7pm on other days
- Work with commercial train operators to create more facilities at NSO rail stations for visitors and opportunities for others to build on e.g. 'Railway walks' ,cycle hire/electric bike hire
- Aim to find funding to promote NSO product in conurbation hubs on train line

3. CONNECT - COMMUNICATE YOUR MESSAGES

- Agree a shared database/social media mechanism for regular and improved communication across NSO industry sector
- Continue to improve and develop look and functionality of website(s) especially itinerary building, user generated content and key word/theme searching, potential for time-limited PR opportunities e.g. anniversaries, calendar events, festivals, new developments, topical news, TV coverage/adaptations, national stories celebrity endorsements. Increase personal and UGC recommendations e.g. 'My Shropshire Borderlands ' choice options
- Exploit. and feed into existing PR by your partners, improve effectiveness and increase investment

4. KNOW YOUR PRODUCT – BE AN EXPERT

- *Sharing Our Shropshire* type sessions – theory plus familiarisation trips for front line staff
- Develop suggested visitor itineraries/mini-packages, to promote on and offline via Shropshire Tourism and all other customer facing media/brochures, leaflets etc
- Set up mystery shopper cross-towns programme to benchmark experience specifically, if informally, and feedback/link to Share Our Shropshire above at 4

- Develop walking/'sense of place'/local know-how training sessions for local businesses – how to promote and market walking and walking breaks
- Ensure walking and cycling routes are linked to accommodation, food and drink locations

5. DEVELOP THE DISTINCTIVE

- Tease out suitable products and packages for niche and specialist visitor opportunities. Some may go mainstream if successful
- Maximise the individual Markets – distinguish the offer and cross sell
- Address the 'silent Sundays' syndrome – encourage more animation and events in the market towns, invite proposals for specialist markets to operate on Sundays
- Support the Disability Holiday Information Service so that NSO can excel in this provision.

APPENDICES

APPENDIX A Consultations

There have been literally too many to mention, such has been the willingness and interest in the subject.

Thanks go to all those participants:

- Tourism Conference held in May 2011, led by Shropshire Council and the DDP, starting the process of identifying the big issues with around 40+ attendees

- May 2012 Challenges workshop, again over 40 participants

- May and June 2012, Whitchurch and Oswestry town workshops (20+ at each of two sessions)

- Dozens of one-to–one detailed meeting and telephone consultations, including some of those participating at workshops, with Alison Patrick, Tourism Officer , and with the 360 Tourism Consulting team

APPENDIX B Documents Sourced

Oswestry Borough Visitor Survey 2007 (TRS)

North Shropshire District Visitor Survey 2007 (TRS)

Whitchurch Destination Benchmarking study (MTI) 2007 (TRS)

Oswestry Destination Benchmarking study (MTI) 2007 (TRS)

Wem Destination Benchmarking study (MTI) 2007(TRS)

Market Drayton Benchmarking Study (MTI) 2007(TRS)

Montgomery Canal Economic Development Study, April 2011 and Summary 'Telford's Triangle' by Resources for Change

Perceptions of Shropshire Study Jan 2011 by Arkenford (part of LEP wide perceptions study)

Shropshire Visitor Study 2007 (TRS)

Shropshire's Leisure Tourism and Motivations Study, 2005, 2008 Review by TEAM

A Marketing Strategy for North Shropshire and Oswestry 2011 by Shropshire Tourism

North Shropshire '*Sharing Our Shropshire'* research project 2010

NSO DDP summary and outputs of mini conference 2011

DDP Terms of Reference

North Shropshire TA AGM notes 2010, 2011

Oswestry Borough Council Tourism Development Strategy 2007 – 2017

Pontcysyllte Aqueduct and Canal World Heritage Site Management Plan

Pontcysyllte Aqueduct and Canal World Heritage Site Tourism Development Plan, 2010

Meres and Mosses of the Marches Landscape Partnership Scheme Summary

Clywydian Range Sense of Place Toolkit, Clwydian Range Area of Outstanding Natural Beauty Partnership, 2010

APPENDIX C Summary Overview of Main Marketing Leaflets, Brochures and Websites

Area	Leaflet Name	Website	Format	Map	Accom	Attrac-tions	Vouch-ers	Walks	Shops
Shropshire	Shropshire Days Out	shropshiredaysout.co.uk	A2 folded	Shropshire		Y	Y		
Oswestry	Escape to Oswestry	Borderland-breaks.co.uk	A5 brochure 44pp	NS+NE Wales/ Street	Y	Y			
NSandO	Discovery Map	northshropshire.co.uk	A2 folded 16pp/A5	NS		Y			
Oswestry	Explore	Oswestry-welshborders.org.uk	A2 folded 16pp/A5	NS+NE Wales/ Street	Y	Y			
Shropshire	Wheelchair User's Guide and Trails in Shropshire and the Borderlands	disabledholidayinfo.org.uk	A5 brochure 24pp	Shropshire				Y	
Shropshire	Wheelchair User's Guide to Accessible Activities in Shropshire	disabledholidayinfo.org.uk	A5 brochure 28pp	Shropshire					
Shropshire	Wheelchair User's Guide to Accessible Tourist Attractions and Accomm-odation in Shropshire	disabledholidayinfo.org.uk	A5 brochure 18pp		Y	Y			
Oswestry	Oswestry Walking and Cycling Map	travelshropshire.co.uk	A3 12pp trifold	Oswestry+ Gobowen					
Oswestry	Oswestry Cycle Rides	shropshirecycling.co.uk	12pp folded leaflet						
	Regional Cycle Route 31	sustrans.org.uk	A3 12pp trifold	Oswestry to Whitchurch					
	Canal Trails		16pp folded(A6)						
Ellesmere	Ellesmere Cycle Rides	shropshirecycling.co.uk	12pp folded leaflet						
Ellesmere	Shropshire's Lakeland	ellesmere.info	A3 12pp trifold	Ellesmere		Y			Y
Ellesmere	Ellesmere Shropshire	visitellesmere.co.uk	A3 12pp trifold	Ellesmere					
Wem	Come Shopping in Wem	wemlocal.org.uk	A3 12pp trifold	Wem town					Y
Market Drayton	Market Drayton	no website	A4 trifold	Drayton town/wider map	N	Y	N	N	Y

Area	Leaflet Name	Website	Format	Map	Accom	Attrac-tions	Vouch-ers	Walks	Shops
Miscell-aneous									
	Oswestry Archives	Oswestry-tc.gov.uk	A4 trifold						
	Oswestry Museum	oswestrymuseum.org.uk	leaflet						
	Day Out at Derwen Enterprises	derwen.ac.uk	A4 trifold	Oswestry plus					
	Woodland Den Play Area	gotothevenue.com	A5 4pp						
	The Venue at Park Hall	gotothevenue.com	long,wide, brochure						
	Whittington Castle	whittingtoncastle.co.uk	A3 12pp trifold	Oswestry					
	Park Hall Farm	parkhallfarm.co.uk	A3 12pp trifold	Outline					
	Wordscape		A5 leaflet						
	Border Visual Arts	bordervisualarts.com	leaflet	Oswestry					
	Cambrian Heritage Railways	cambrianrailways.com	8pp folded leaflet						
	Llanymynech Limeworks		Pocket illustrated brochure	Chester to Welshpool					
	Offa's Dyke Path(E/W)		A3 12pp trifold	Offa's Dyke					

APPENDIX D Identity, Emerging Inspiration for Ideas

Some of the resource comparators adjacent to the NSO area, which can help inspire ways of thinking about clarifying the identity of the area.

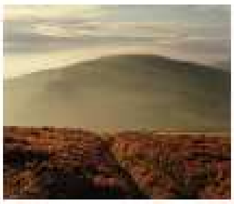
Clwydian Range AONB Sense of Place Toolkit www.clwydianrangeaonb.org.uk/senseofplacetoolkit/

The nearby AONB sets out a very useful visual communications guide, including web embedded high quality images that local businesses and partners can use. It provides the image and language that communicate, and sell best the characteristics, places, people, and sights that give the 'sense of place' to the Clwydian Range area:

The Range Story in Words and Pictures

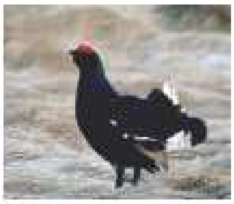
There are so many aspects to the Clwydian Range story. Everyone finds something about this place that's special to them. For some it's the walks and the views, others enjoy the flowers and butterflies of the limestone grasslands, a few yearn to glide above the heather and hillforts, many just fancy chilling out with a cappuccino at the Loggerheads café.

This section of the toolkit sets out the main elements of the Clwydian Range story, told from the visitor's point of view. We've based it on a series of themes, building up the narrative behind them in both words and pictures, so you can pick what's interesting and relevant to the visitors you deal with, and then use that within your own materials.


THE RANGE
Dramatic upland frontier of North Wales


LANDSCAPE
One of Britain's finest, most varied landscapes


VIEWS
Breathtaking views in open, tranquil countryside

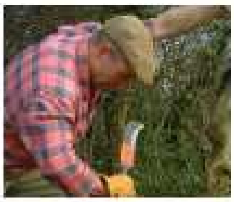

NATURE
Up close with nature


HISTORY
In the footsteps of ancestors


ACTIVITIES
Healthy recreation for everyone

COMMUNITY
Alive with vibrant communities and quality services

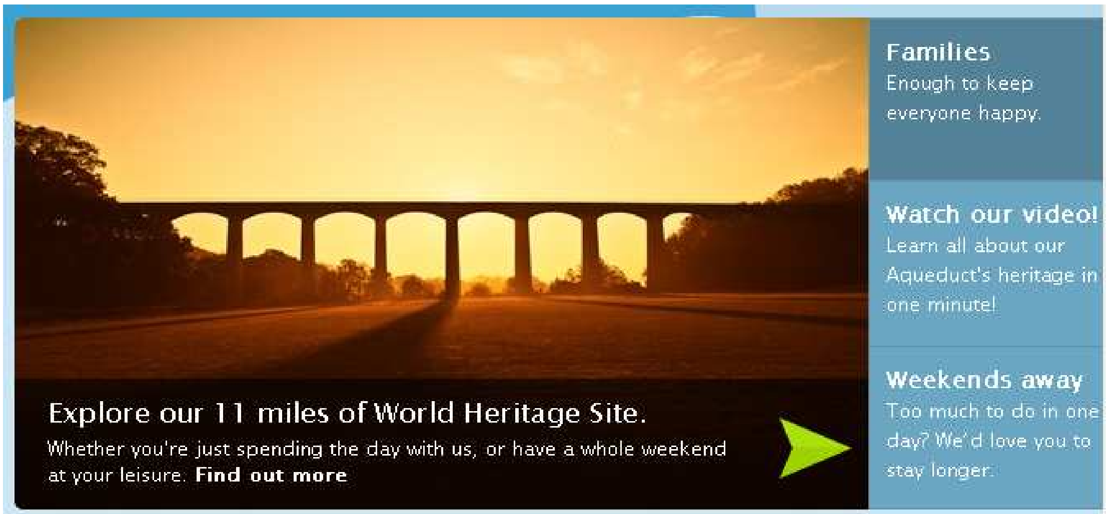

ATTRACTIONS
Always more to see and do


LEARNING & CARING
A place to appreciate and conserve


GETTING HERE
Less discovered yet easy to reach and explore

Pontcysyllte World Heritage Site www.pontcysyllte-aqueduct.co.uk/

Wrexham/Wales have approached the promotion of the WHS and have already started to segment the offer - NSO has quite a bit more work to do to match the style as well as the substance (albeit that Wales has more money per capita resource than England for tourism). In sections of the WHS website, different types of visitors are encouraged to explore the whole area, not just the aqueduct focal point:



Consideration around potential brand identities for Shrewsbury and Shropshire has generated some additional concept ideas which have not been adopted, and not specifically tailored to NSO needs. However, the following may give inspiration to THE SHROPSHIRE BORDERLANDS. Source © *We All Need Words & Smith,* through Head of Visitor Economy at Shropshire Council.

SHROPSHIRE ENGLAND'S SLOW DOWN COUNTY

Ludlow
Slow down for food

Ironbridge
Slow down for history

Wenlock or North Shropshire
Slow down for fresh air

Shrewsbury
The capital of England's slow down county

SHREWSBURY *the* CAPITAL OF ENGLAND'S SLOW DOWN COUNTY

NORTH SHROPSHIRE SLOW DOWN *for* FRESH AIR

LUDLOW SLOW DOWN *for* FOOD

IRONBRIDGE SLOW DOWN *for* HISTORY


TURN
OFF the
ALARM
SHROPSHIRE
ENGLAND'S
SLOW DOWN
COUNTY


SHROPSHIRE
ENGLAND'S
SLOW DOWN
COUNTY
AND BREATHE...


Shopping
Eating
To do
To stay
Events
AND BREATHE...
SHROPSHIRE
ENGLAND'S
SLOW DOWN
COUNTY
SHREWSBURY
the CAPITAL
OF ENGLAND'S
SLOW DOWN
COUNTY
NORTH
SHROPSHIRE
SLOW DOWN
for FRESH AIR
LUDLOW
SLOW DOWN
for FOOD
IRONBRIDGE
SLOW DOWN
for HISTORY

APPENDIX E Heritage Railways as a Potential Major Heritage Enhanced Product

CAMBRIAN HERITAGE RAILWAYS

'Securing the restoration of the Cambrian Railways in order to preserve the unique Railway Heritage of Oswestry and to provide a visitor attraction of national significance.'

The Cambrian Heritage Railway is an existing element in the breadth of choice of what visitors can see and do particularly in the Oswestry area, but at this stage it has low external **public** presence compared to surrounding 'big boys' such as the Severn Valley Railway (SVR) or indeed the many Welsh heritage railways. Visitors to Shropshire, if interested in a heritage steam railway experience, will undoubtedly gravitate to SVR's experience over 16 miles of beautiful countryside. The question is, can the Cambrian Heritage Railway grow to offer a **sufficiently adequate and regular** visitor experience that will allow it to be marketed robustly by other bodies and to be part of the 'must dos' not only of the local area but also the county and its bordering counties. In Wales there are plenty of heritage rail experiences but less so in the immediate other neighbouring counties.

The national context

The recent building of the *Tornado* shows the depth of affection many of these beasts of the track inspire and the many advertised commercial Heritage railway trips around the country bear out their popularity. The continuing popularity of the Agatha Christie, Hercule Poirot and similar 'nostalgia' TV programmes and films has provided some of the more successful preserved railways with a useful source of (much needed) income from film and TV companies for many years. The growth of 1940s and other themed events, the popularity of Thomas the Tank Engine events and festivals all point at least, in appearance, to a successful product in the visitor economy. The major success stories are the West Somerset Railway, North Yorkshire Moors Railway, The Mid-Hants and the Bluebell Line as well as the Severn Valley Railway. The Heritage Railway Association which has well over 200 operating members (including trams and cliff railways) and some 250 members in total including sponsors and other commercial members. It has some high profile individuals associated with the movement too: many from the heritage sector, plus politicians and writers. And yes, unsurprisingly it is a male dominated sector but not exclusively.

Collectively the economic impact of the sector is around £84 million. Well over 9 million visitors go to 399 stations, of which around 6.8m passengers take a train ride across some 510 miles of track equating to 1.2m passenger train miles. Interestingly research also shows that of these 45% of visitors say they come for the events, scenery, café etc. i.e. not the train ride) and 55% come for the trains specifically.

Overall there are around 2,000 employees (though more are now part-time) and there are 18,000 volunteers equating to 3,627 full time jobs – and of huge importance when measuring in kind support against funding applications such as HLF.

Regional and Local context

The original Cambrian Railway was formed in the early days through the merger of a series of regional railway companies on the England/Wales border. Due to LNWR's connection with the LNWR station at Gobowen, it meant CR and LNWR trains could come from the northwest and North Wales into Mid Wales and beyond. Thus LNWR had an alternative route to the GWR mainline, enabling it to run trains between the coal and steel industries of South Wales, into the industrialised Midlands and Northwest. Its pedigree is thus part of both Oswestry's history and Britain's industrial heritage.

Merged into the GWR on grouping, it closed its old Oswestry station and ran all services from the former CR/LNWR station. On nationalisation in 1946 it became part of the Western Region of BR, but moved to the London Midland Region in 1963. Then came a big decline in services, with the final powered passenger service in 1968. Occasional quarry trains ran until 1988 to Blodwel, after which the track was abandoned by Network Rail, though still in place fortunately for what came next.

The Cambrian Heritage Railway experience operates from both its Oswestry station and also from Llyncylys, five miles south west. The history of railways in Oswestry, sometimes claimed as the Swindon or Crewe of Shropshire in its day, due to the growth of its railway links in Victorian times and the concomitant growth of the town itself, is fascinating and clearly has some support. It adds a dynamic attraction (though limited operation days) and has obvious themed links for many visitors to the romanticised GWR and also to other 'soft' industrial heritage attractions such as the Pontcysyllte aqueduct WHS and also the Llanymynech heritage site..

There is a need to recognise the significant financial commitment in future to infrastructure to make it work but the link with Gobowen and mainline rail would be massively beneficial to whole area – both for residents and visitors. Formed after the 2009 merger of the Cambrian Railways Society and the Cambrian Railways Trust, the **Cambrian Heritage Railway Trust** aims to reinstate the infrastructure required to operate trains from Gobowen to Llynclys Junction (for Pant), and to Blodwell.

Why re-open the railway?

An eight-mile long heritage railway will be a major destination tourist attraction for the area. It will join the main Network Rail line at Gobowen; serve the Park Hall Experience and the renowned Orthopaedic Hospital with a halt at Park Hall; boost the numbers of visitors using the shops and other businesses in Oswestry; improve access to the Montgomery Canal, Llynclys Common, Llanymynech Heritage Limeworks Area and a variety of nature reserves. Visitor numbers to the Iron Age hill fort (Old Oswestry), the Norman motte and bailey castle (Castle Mound) and the Cambrian Railway Museum should all increase. The railway line will link attractions and encourage people to visit the area for longer. Local tourists will find sufficient interest to spend a whole day in the area whilst tourists from further afield may stay for a weekend or several nights in hotels, guest houses or campsites. Through the restoration of the railway and the canal, jobs will follow in Oswestry and the villages served by stations. This will contribute to the economic regeneration that Oswestry needs. You only have to visit Llangollen and Bridgnorth to see how towns and nearby villages have benefited from a heritage railway.

Comparisons with SVR and how that relates to CHRT

Starting from late 1960s the development of the Severn Valley Railway (SVR) over the last 40 years has been dependent on donations, fund-raising campaigns and a significant contribution by volunteers from around the country. SVR runs between Bridgnorth and Kidderminster for 16 miles where it now connects into the mainline system. It has a share holding company raising money periodically through share issues, and there are 13,000 shareholders. Its Chair is now the former Chair of *Advantage West Midlands*.

Visitor numbers have always been over 200,000 since 1999, reaching 250,000 in some years and 225,000 in 2011. Around 58% of visitors come from West Midlands counties and the remainder from elsewhere in UK with a small number from overseas, mainly Australia, US and Germany.

20,000 come in group visits and 15,000 school children visited in 2011. Santa trips attracted 38,000 and the Steam Gala 13,000. 1 in 5 visitors are children and over 40% are pensioners. Grandparents taking children is a big market but one must ask how long will that continue when 'memory' is only second hand?

Economic impact

SVR's turnover is c£6m and it employs 84 f/t equivalent staff and a pool of 1000 volunteers. On a busy day 200 volunteers could be needed to operate the whole system. Its off-site impact, generated by SVR visitors' spending money in the local economy on food, drink and accommodation (and its associated multiplier effects) is considerable. The annual economic impact of the SVR is around £10.9 million (direct + indirect) in output, generating £5.39 million in GVA. This supports around 283 jobs [including their own] in the West Midlands.

Modelling these figures up to a SVR full capacity figure of 275,000 visitors would produce the following economic impact; approximately £10.9 million - £11.8 million in output and £5.4million - £5.8 million in GVA.

A perverse but useful measurement of impact was the loss that the 2007 floods caused SVR and subsequent actions to restore and promote the line due to the detrimental effects also on the communities along the route by the closure.

The total repair cost was estimated at £2.5- £3 million, was funded by AWM, the Heritage Lottery Fund, Government Office West Midlands (providing ERDF support) and a public appeal fund. Of course such largesse would be very unlikely now since two of these bodies no longer exist and HLF was happily still involved with the Highley project and could thus help. This would not be the case now. An estimated 172,500 fewer visitors came (a drop of 75%) compared to the previous year, resulting in nearly £3.5 million in lost income for SVR. By comparison, the Glos and Warwicks Railway had two later slips which almost pushed them into closing. Although most was covered by insurance, the main economic impact was on other local businesses linked to the railway. The loss in earnings to suppliers and other tourism related businesses based elsewhere in the West Midlands was estimated at around £3.8 million. This represented the equivalent of around 100 jobs (FTEs) lost to the economy.

Challenges

There is little doubt that the volunteer team at CHR (**all are** volunteers both trust and operational) are focused and professional and since the merger there has been a greater understanding of the realities. There is a good track record of fundraising from public bodies and of delivering projects satisfactorily. The argument for renewing the line to Gobowen and providing mainline services for all is not a tourism project – it is a vital part of connecting rural areas with the businesses of the neighbouring areas and conurbations. Oswestry with no proper station does seem a bizarre construct.

The **Cambrian Heritage Railway** proposal to reopen the Gobowen to Blodwell railway, despite the enormity of the project, can sensibly be compartmentalised to demonstrate a sound economic outcome within each stage for the local economy. Considerable investigation and design has taken place over the past ten years and the vital following documents have been prepared (by Capita Symonds through HLF funding):

1 Conservation Management Plan.

2 Ecological Management Plan.

3 Audience Development Plan.

4 Access Plan.

5 Archaeological Assessment.

6 Business Plan

7 Land surveys and route plans.

8 Cost plans.

At the moment the emphasis is concentrated on obtaining the Transport and Works Act Order, which has progressed with the draft order having been prepared by the parliamentary solicitors who are now awaiting instructions to proceed to publication. However there are a number of environmental and ecological matters that need to be updated as well as the promotion of the project in the public domain. These appraisals are currently on hold pending clarification of the crucial allocated funding from Shropshire Council.

Despite the funding constraints the railway continues to run trains at weekends from their two current bases of Llynclys and Oswestry creating considerable interest in the project from both visitors and new volunteers. There are more operating days at the former and it may be fair to say that the setting is more attractive. The need for more working days is obvious since the danger is that the promise cannot be delivered on a regular basis for visitors. Works also continue to improve the visitor experience at both centres as well as encouraging both walkers and cyclists as part of the new Shropshire Link. A small grant from the MTRP will enable a clean-up of the station area.

What CHR needs

The challenges for growth are both operationally on a day to day basis but also, comparing the SVR situation and history, it's possible to see the risks for the future. However, with fuel costs rising, little public sector input into subsidised bus transport across the area – especially on weekends – it would seem that the connection is an obvious supportable project. The current programme for RDPE is looking for 'transformational' projects and it is understood that SVR themselves are applying. A Regional Growth Fund bid might be feasible as would be ERDF under new programmes for the future? But without mainstream support from Shropshire Council and Welsh Government it seems unlikely that the Trust could achieve this alone, even though they have made such good progress.

What would make a difference?

There is an obvious need to create a much better online presence and the provision of marketing resources, but there are fundamental requirements which need to be in place for any future growth. Advice from the sector for this study is to be aware of the huge infrastructure costs for regular maintenance and to deliver the implications of the vital Safety Maintenance Plan (SVR's is 57 pages). There is also the big problem of finding the right skills : blacksmiths, ironworkers and other engineering skills are not easy to find. Many of those involved in these areas are now at the end of their working lives. HLF is of course helping with these skills issues but it is an issue for the heritage sector as a whole. The jump from the limited operations at both Oswestry and Llynclys to a regular, reliable service such as operated by SVR is an enormous one. Managing not only paid staff but a huge number of volunteers is onerous and the economy is not helping when a Trust is dependent on paying visitors. Old systems and the need for overhauling engines at £400K at a time is equally vital and a financial burden that cannot be avoided.

Prognosis for the future

The tipping point is when the journey 'goes somewhere' – a worthwhile distance for the visitor to spend on, and thus the success for the future of CHR must be the extension of the line. Then the Tanat Railway would also join up and one starts to see a major web of links making sense once more and moving more people into using the services.

Researching the project has shown however that the CHR Trust is capable of working towards this end and has the skills and expertise to understand the public sector's constraints as well as to work towards the final goal. The leap to visitor numbers of more than 30,000 is the first goal since this number is usually the recognised tipping point for viability and the possibility to employ. 50,000 would be the vital number to reach. The SVR's numbers are the reflection of many more years of development work and of course being within a much bigger urban catchment area, which the CHR is not.

APPENDIX F Potential Itinerary for an Accessible Break (Suggested by Disabled Holiday Information Service)

'An intriguing two night accessible break in the Shropshire Borderlands'

Ellesmere is a small town situated in an area known as Shropshire's Lake District because of the abundance of glacial meres located in the area. It typifies the beautiful countryside of North Shropshire.

Mereside is an excellent accessible B&B within five minutes walking/wheeling distance from the Mere. The owners offer a warm welcome to all visitors and amongst the accommodation is a single storey property, which has its own entrance and pretty courtyard garden.

After breakfast, which is served in the main farmhouse the morning of Day One could be spent exploring the town which is located alongside the Shropshire Union Canal. It has a diverse selection of independent retail outlets including a wonderful delicatessen stocked with a wealth of tasty local produce.

The Mere has a visitor centre and the Boathouse Restaurant with stunning lakeside views and attractive outside dining area. There is also a pleasant level easy access trail which passes through the park and woodland to the far side of the lake.

Suggestions for the afternoon could include a trip to Whittington Castle (owned for centuries by the Fitzwarren family) with its accessible boardwalk and/or a visit to Chirk Bank and crossing Chirk Aqueduct which forms part of the World Heritage Site. Returning to Chirk Bank car park, we recommend checking out the recently resurfaced level towpath along the canal side as far as the Poachers Pocket Inn which serves excellent lunches and evening meals.

Day Two – A morning trip to Park Hall Working Farm would provide great family entertainment or alternately why not explore the ancient market town of Oswestry making sure not to miss out the Gallery in Willow Street and the colourful floral displays in Cae Glas Park. If time allows this could be followed by an afternoon exploring the unique Industrial Heritage site of Llanymynech which offers a unique opportunity to see inside one of only two remaining examples of the Hoffman Lime Kiln in the UK.