

enjoy Staffordshire 

**DESTINATION STAFFORDSHIRE
TOURISM REVIEW, STRATEGY
AND ACTION PLAN 2015-2018**

*Improving and growing Staffordshire's visitor economy
for the benefit of all*

April 2015

Katie Foster, Alison Caffyn and Andrew Meredith
Members of 360 Tourism Consulting



CONTENTS

1. INTRODUCTION	3
2. STRATEGIC CONTEXT	5
3. VISITOR ECONOMY PERFORMANCE	8
4. REVIEW FINDINGS.....	12
5. STRATEGY, AIM AND OBJECTIVES	17
6. ORGANISATION AND DELIVERY	20
7. DESTINATION STAFFORDSHIRE ACTION PLAN.....	24
APPENDIX 1 STAKEHOLDER CONSULTEES.....	28
APPENDIX 2. THE STRATEGIC CONTEXT	29
APPENDIX 3. VISITOR ECONOMY PERFORMANCE.....	39
APPENDIX 4. FINDINGS FROM CONSULTATIONS.....	50

1. INTRODUCTION

Destination Staffordshire is the Destination Management Partnership (DMP) for Staffordshire, supported by its local authorities and membership. This Strategy and Action Plan will guide the activities of the DMP and its partners over the next three years 2015-2018.

The Strategy builds on the previous 2011-2014 Strategy, taking into account the progress and achievements made and the changes to the local and national economic and strategic context since 2011. The process has included a 'light touch' review of the previous Strategy and Action Plan to **refresh, re-direct and refine** the approach and actions. Key support for tourism as a growth sector of the economy means that this Strategy is aligned to reflect the priorities of the three Local Enterprise Partnerships (LEPs) which cover Staffordshire.

Subsequent to the production of the previous 2011-14 Strategy ERDF grant aid was successfully secured to fund substantial tourism development, skills and promotional activity identified in the Action Plan. Some elements of the funded programme have now been increased and extended until December 2015. Thus there is an overlap between the original Strategy endpoint and the activity underpinning it. However, this is not considered to be an obstacle in reviewing the Strategy's aims and objectives but rather to offer further insight and intelligence into the strengths and weaknesses of the original plans as well as providing 'live' direction for the future.

Since the DMP has now been well established over some years the review process has been more concentrated and focused in order to provide a Strategy that is **simple, more succinct, and easy to absorb**. It is also designed to be useful for further funding applications, and when working with other strategic partners. It has been prepared in consultation with the Staffordshire tourism industry and other key organisations.

The review draws on a number of components to inform progress and set future priorities, including:

- Desk research into the strategic context influencing Staffordshire and its visitor economy
- Market performance documentation using the latest research intelligence
- Strategic stakeholder consultations with *VisitEngland*, DMP Board members, public sector partners, major attractions and accommodation providers, businesses and organisations involved in the visitor economy across the county and the majority of the DMP's external suppliers
- Consultations with delivery bodies and consultancies about the ERDF programmes they are delivering - including marketing agency RH Associates, Winning Moves and Tourism South East
- An industry workshop held in Stone in February 2015 with a wide range of small, medium and large businesses and organisations involved in tourism activity in the county
- The consultants' collective observations and experiences.

Consultations have included a review of achievements set against the previous action plan – identifying successes, hurdles and elements that did not achieve what had been proposed. Consultees gave their views on how relevant, effective and appropriate the twenty priority recommendations were after four years.

An **Interim Report** was produced which set out in full the performance review, analysis of the strategic context and partnerships, consultation findings and initial reframed priorities for action. This Strategy document now summarises those sections and builds on the conclusions to set out revised priorities, objectives and a detailed action plan alongside proposals for how best to deliver the action plan. The detailed sections on context, performance and consultations are now contained in the **Appendices** – for those who would like to see how the overall process has informed the final strategy and action plan.

The **Action Plan** has been developed taking into account the capacity of *Destination Staffordshire* and its partners and members to enable successful and effective delivery, alongside the potential budgets which may be available to fund activities.

2. STRATEGIC CONTEXT

There is a range of national, county and cross-border strategies and policy documents which relate to the visitor economy and forward planning for the sector in Staffordshire, most of which have been published in the last few years. The detailed review is given in Appendix 2.

From a national perspective **VisitEngland** is updating its strategic framework (2010-2020) this year. This is likely to focus on product development and 'experiences'. It is realistic in its approach, recognising that the English tourism product across the board may just not be strong enough, that not everywhere can compete on a global tourism stage where there is so much excellence. A key thread is likely to be the idea of 'Great destinations'.... where you have 'Great experiences'. The **vision for tourism in England in 2020** has been reframed as: '*A resilient and globally competitive tourism industry that acts as a key driver of the economy and local prosperity across England*' and the ambition for 5% growth in value year on year until 2020 remains.

The Peak District, including parts of Staffordshire Moorlands, has for some years been one of the 39 English 'Attract Brands' which *VisitEngland* has prioritised to focus marketing budgets and impact. The new focus is likely to be on fewer, bigger, excellent 'products' around England. If this is carried through then it will require *Destination Staffordshire* to 'up its game' even further in order to compete with the bigger players. It is also likely that Rural Tourism will cease to exist as a separate entity but will merge with the wider countryside "experience". A product development 'Challenge Fund' has been recommended with further details of this due later in the year.

At a County level **Staffordshire County Council** produced its own Tourism Strategy 2012-2014. It sets out a new focus for its relationship with *Destination Staffordshire* its key delivery partner; in particular to guarantee resources for web service provision and brand marketing that underpin the promotion of Staffordshire as a tourism destination. The strategy particularly urged more private sector investment in accommodation, through identifying potential development sites for hotels and targeting inward investment from developers; the aim being to increase the numbers of visitors staying overnight and for short breaks, and thus increase occupancy levels.

Destination Staffordshire commissioned a **Visitor Information Strategy** and **Digital Framework** which identifies the main market segments for information and how to improve awareness and presentation of Staffordshire products amongst both actual and potential visitors. There is an emphasis on **digital delivery**, alongside traditional channels and the importance of good visitor information in a county as diverse as Staffordshire. Resources should establish strong digital foundations (in terms of systems, content and skills) that will have long term benefit to tourism in Staffordshire and enable the industry and tourism stakeholders to operate effectively with greatly reduced future dependency on *Destination Staffordshire*.

The Three Local Enterprise Partnerships (LEPs) which collectively cover Staffordshire all produced Strategic Economic Plans in 2014. Tourism is identified as a 'barometer sector' in the **Stoke-on-Trent and Staffordshire LEP (SSLEP)** plan along with Professional Services. The Plan identifies that national attractions such as Alton Towers, Drayton Manor, Cannock Chase, the National Forest and the Peak District can draw in day visitors and help retain families living locally. The sector's priority is to make more consumers aware of Staffordshire as a destination for a short break, so encouraging greater volume of overnight stays, increased revenue and more employment in the industry. Stoke is a high

priority, but whilst inward investment is a priority through a 'Red Carpet' programme little is made of tourism's impact on the image and perception of Staffordshire. The Chairman of *Destination Staffordshire* sits on the LEP Board.

The Greater Birmingham and Solihull Plan states that the area 'has the most developed cultural infrastructure outside the capital, making it one of the most significant leisure and tourism destinations in the country' however it includes **very few** tourism-related priorities. A separate **Visitor Economy Strategy Framework** identifies four 'pillars':

- **Doing Business** - targeting and growing international conferences and exhibitions
- **Going Global** – growing leisure visits from Germany, France, USA, Australia, India and China
- **Cultural Showcase** - to make much more of the area's outstanding cultural assets
- **Going Local** - growing the volume and value of day visitors and delivering excellent customer care

These pillars then work across four themes:

- **Entertainment** – Festivals, Performances, Attractions, Sport
- **Pleasure** – Shopping, Eating, Strolling, Socialising, Enjoying the countryside
- **Enlightenment** – Galleries, Museums, Heritage, Knowledge
- **Business** – Conferences, Meetings, Exhibitions

An analysis of the potential economic impact across Greater and Solihull which could be generated through this Visitor Economy Strategy has estimated the potential for £210m to £390m of additional Gross Value Added GVA (direct and indirect) and 4,700 to 9,000 additional jobs by 2020, if the targeted increase in visitors is secured.

The **Derbyshire Nottinghamshire LEP D2N2**, which neighbours Staffordshire and shares the Peak District National Park, highlights the visitor economy as **one of eight priority sectors** and an ambition that '*by 2023 D2N2 presents a world-class destination of choice for visitors and investors alike.*' This Plan has much more detail on tourism and identifies the need for capital investment in visitor attractions; the potential to increase employment by exploiting new opportunities and markets, such as the growth of cycling as a leisure pursuit; and the development of key natural and heritage assets. Opportunities include business tourism, festivals and events, tactical marketing, branding and gateways and hubs. Key programmes proposed include:

- Business Growth Fund
- Sector Skills Action Plans
- Supporting our market towns and rural areas.

The **D2N2 LEP** also produced a Visitor Economy Review and Investment Study with recommendations for the Peak District and southern Derbyshire which are relevant for Staffordshire and could involve cross border working. Of the three LEP plans this is the one more likely to grasp the emerging new *VisitEngland* approach and priorities.

Other strategies which have been reviewed and will influence *Destination Staffordshire* over the next few years include:

- South Staffordshire District Council Tourism Strategy 2014-17
- Staffordshire LEADER Local Development Strategy 2014
- The National Forest Destination Development Plan and Management Plan 2015 (in preparation)
- Staffordshire Hoard Trail Marketing Strategy 2014

In developing Staffordshire's forward approach to tourism, the above strategies indicate two core drivers. These are the need to **work more effectively and collaboratively**, creating increased **business success, growth and employment**; and secondly a generally positive attitude towards **improving destination identities and connections** with the aim of **increasing visitor numbers, spend and activity**.

Staffordshire as a whole must build on these opportunities, to create **a strengthened visitor product and experiences**, a **clearer and more visible identity** and **offer, be better understood** by the **industry** itself, by **politicians** and above all **retain existing** and **attract more potential** visitors.

3. VISITOR ECONOMY PERFORMANCE

A range of performance indicators are set out, with detailed analysis in Appendix 3.

Performance targets

A series of performance targets were set for the DMP by the Staffordshire County Council Tourism Strategy 2012-2014. Good performance is being achieved in the key areas of leisure tourism value and employment. The **Tier 2 Objectives** of Staffordshire County Council in delivering a strong growth strategy for the visitor economy and its performance to date are:

DMP Target Objective Forecast set in 2011	Actual performance by 2014
Continued growth in the Staffordshire leisure tourism economy from £1,037 million (estimated) in 2011 to £1,197 million in 2014	Actual economic impact measured in 2011 was lower, at £1,001 million - a reduced baseline. Growth to 2013 (most recent measure) of £1,139 million, <u>performing well towards target</u>
This leisure tourism economy forecast 15.5% increase in £value and matching that of VisitEngland – noting that VE enjoyed significant extra Government funding and resources to promote tourism over this period	Actual out-turn increase as measured to date, over 2 not 3 years, of 2013 against 2011 already shows a healthy 13.8% growth, <u>performing well towards target</u> – likely to be a reflection of the increased ERDF funding support for the sector
Increased employment levels in the leisure tourism economy from the 21,054 direct jobs in 2011 (estimated), to 23,245 in 2014, up by 10%	The 2011 estimate of employment was probably over-optimistic – actual jobs subsequently modelled showed a lower baseline of 18,435. 2013 actual 20,153 <u>shows an increase</u> overall, albeit not at the scale originally forecast

Economic Impact

With its EDRF funding, *Destination Staffordshire* has been able to maintain the important annual modelling of tourism estimates to the county. The key results of the Staffordshire Economic Impact Assessment¹ for 2013 (including Stoke-on-Trent) are:

- 23.9 million trips; as 22.3 million day trips, and approximately 1.6 million overnight visits.
- The overnight trips account for a total of 4.2 million nights in the area.
- Spend of c. £1,139 million. On average, this equates to c.£95 million monthly spend into the local economy.

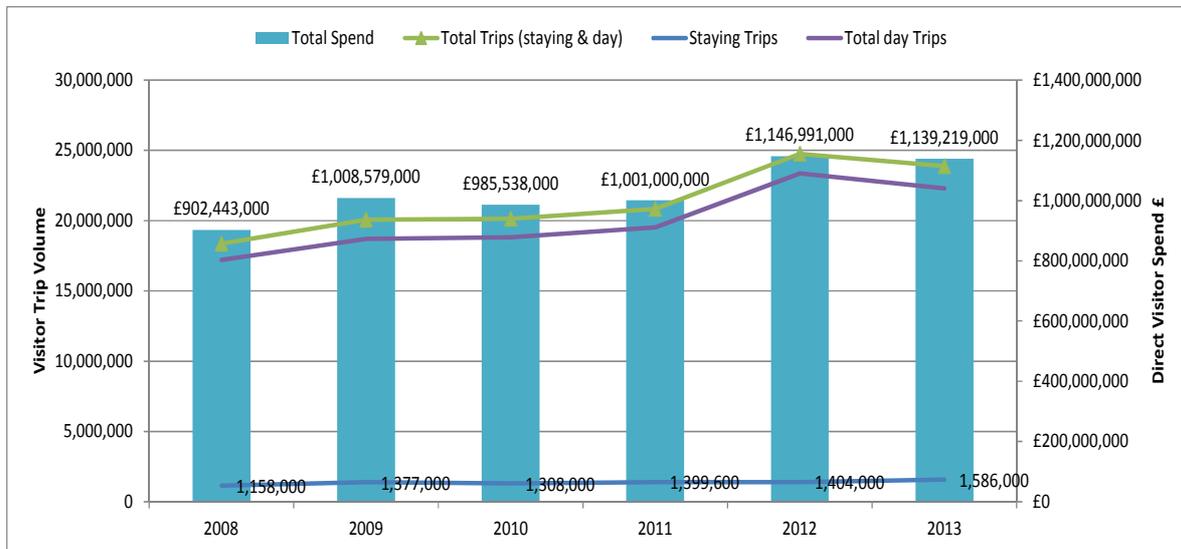
¹ The Research Solution, 2014

- Overnight visits generated c.£234 million, with £906 million being from irregular day trips.
- This spend on tourism in the area supports around 28,331 jobs, both for local residents and for those living nearby. Approximately 20,153 are direct tourism related jobs supported, with an additional 8,177 non-tourism jobs dependent upon multiplier spend.

Whilst not comparing like-for-like destinations, as a useful example the variation between Shropshire plus Telford & Wrekin and Staffordshire with Stoke-on-Trent **shows how well Staffordshire is performing** (note data estimated for two different years (2011 and 2013)). The average monthly value of tourism income across Shropshire is £55million, compared to Staffordshire’s £95million per month, although revenue generated per head of population is still higher in Shropshire and Telford by some £350 a head. Staffordshire has **higher total trips** (24 million) than Shropshire and Telford & Wrekin’s 15 million. These additional numbers are likely to be generated by the three major theme/leisure parks in Staffordshire, reflecting how important they are to the visitor economy.

In terms of growth in all **overnight staying trips 2008-13, Staffordshire outperformed the region and England**; Staffordshire +37.0%, West Midlands +14.5%, England only saw +6.8% growth and this despite the accommodation issues identified throughout this review .

Shown as a graphic, **the general upward trend in trips, days and spend** for Staffordshire is more clearly seen in the table below.



Source: Destination Staffordshire

Accommodation

- When reviewed in relation to the resident population of the county, Staffordshire ranks around the **regional average** of number of accommodation establishments per 1,000 head of local population (at 0.5), but far **below** England’s value of 1.3 or Derbyshire’s 2.0.

- Similarly, looking at bedspaces provided, Staffordshire and Stoke-on-Trent (based on the *VisitEngland* database) have just c.16, 500 bedspaces, contrasted with 39,000 in Derbyshire, 23,000 in Shropshire & Telford. The number of bedspaces per establishment is small, **only 32.6 in Staffordshire, below** the West Midlands value of 42.7.

Visitor Profile

The previous Strategy contained a specific action to clarify and redefine the market segments, following on from earlier profiling studies across the whole of the West Midlands, prepared by segmentation specialists Arkenford. The refreshed and refocused key target market segments for Staffordshire are now set out in the *Enjoy Staffordshire 2014 – 2015 Marketing Plan* by RH Partners. The focus is on short break takers with three broad target audiences:

- **Active Leisure** – including empty nesters and newly retired, the largest and most relevant target audience
 - Broad range of interests include walking, ceramics, heritage
 - ‘Attack brands’ – Countryside, Heritage, Culture and the Arts
- **Thrill seekers** – Family audience with school age children (Under 16)
 - Pre-disposed to the County’s world class attractions
 - ‘Attack brands’ - Attractions and adventure
- **Culture and relaxation** – Pre-family couples, affluent couples without children
 - Interests – Arts, cultural experiences, Spas/treatments - relaxing away from the office
 - ‘Attack brands’ – Culture, the Arts and shopping

This dovetails with the segments identified in the 2013 Staffordshire Visitor Information Strategy, TEAM Tourism Consulting. The four main market segments identified as target groups for information provision in Staffordshire are:

- Empty nester / early retired couples
- Young families with children aged 3-16
- Pre-family friends and couples
- Non-discretionary – business, VFR etc.

Perceptions

VisitEngland operates an annual experience and perception-based survey of visitors and potential visitors to various destinations across the country, who pay to be included in the survey (more information on this is in Appendix 3). Staffordshire is a newcomer to the survey, which tends to be

dominated by mature destinations such as the Cotswolds, the Lake District etc. Visitor satisfaction with destinations is analysed using the TRS 'TRI*M model' which **measures the visitor experience** across a wide range of key indicators.

The Total England TRI*M Index is 94. The visitor profile of Staffordshire is closely aligned with English visitors in general; is most likely to attract *Empty Nesters* and *Families*, and appeals slightly more to those in socio-economic group AB. However, by contrast, satisfaction among visitors to Staffordshire appears lower than the national average – Staffordshire has a TRI*M Index of 74. This index is similar to Birmingham and Essex; but behind 92 for Derbyshire, and 100 for the Cotswolds. As a newcomer to the survey the DMP should now use this figure as a positive stimulus for improvement across all aspects of the visitor experience.

Conclusions and implications for 2015-18

In terms of meeting the 2011 County Council KPIs, the leisure tourism figures are performing well, but future targets should be more realistically set, particularly in terms of income and employment, reflecting changing national levels of spend, jobs seeing more part time employment and income generated per job ratios being further stretched.

Economic performance could be increased as the national economy slowly continues to grow. It appears that a greater volume of accommodation – bedspaces and a greater number of larger establishments - could contribute healthily towards an increase in the value of tourism and in the volume of employment across the county.

Staffordshire is now in a good position to use the TRI*M tracking perception survey to motivate the industry, and to demonstrate improved perceptions over time, linked with marketing and destination awareness, to the benefit of all industry sectors not just tourism.

4. REVIEW FINDINGS

Overall the feedback on how *Destination Staffordshire* has performed is very **positive and supportive** and the DMP leadership and team in general are **well regarded**. Staffordshire is unusually well supported by its County Council when compared to many other DMPs across the country and almost all consultees acknowledged the importance of this political and financial support. It was recognised how vulnerable *Destination Staffordshire* would be without this support and that it was imperative that future funding was secured. There is a constant need to demonstrate the value of the visitor economy to politicians and key partners at all levels to retain their commitment.

Other key findings include:

The DMP and its Partners

- Support for the **Board and a sub-groups structure**, although some sub-groups operate and deliver better than others and there is scope for them to be more effective if given more capacity to deliver and if membership were boosted
- Consultees are aware there is a big agenda to deliver and understand the pressures on what is a small team
- Consultees state that it is vital that Staffordshire County Council continues to support and underpin the DMP and its strategic roles especially now that progress in performance has been clearly demonstrated
- **Communication** internally to members and partner organisations is still felt to be somewhat weak and the DMP 'offer' to businesses should be better communicated. There is huge potential to exploit social media and e-newsletters more in order to communicate better with the industry as well as ensuring they are all familiar with new print and web content
- The lack of growth in **membership** over the past four years needs addressing as soon as possible – this could be a weakness in terms of advocacy and representation when competing for future funding
- **Business support/engagement** activities through ERDF funded programmes have been very well received but there is still a need for easily accessible business development and enterprise up-skilling for businesses i.e. building capacity
- **Politics** and **politicians** are seen as a mixed blessing, some understand the sector and 'get it', whereas others can be less helpful and parochial with some conflicts/overlaps between districts and/or the county level or in some cases no engagement at all
- Having three **LEPs** directing future priorities over different and overlapping geographic areas of Staffordshire is not felt to be helpful or sensible and Staffordshire Stoke-on-Trent LEP does not yet appear to have much impact on the visitor economy, though having the DMP

Chair on the LEP is valued. There is also a concern that East Staffordshire and Lichfield are not really engaged with *Destination Staffordshire* but relate rather to Greater Birmingham.

- There seems to be a missed opportunity by all LEPs to capitalise on *Destination Staffordshire's* work on promoting external awareness and positive perception of the area and the relationship to general inward investment
- **Research** is seen as vital - market and performance intelligence has been a tool for advocacy, supporting funding bids, influencing policy and informing marketing. More data is now available and it is proving very valuable but could be shared more extensively and businesses could be encouraged and helped to use it more in their business planning
- Looking ahead, all English DMPs will be under increasing financial pressure – due not only to government funding cuts – but also to the private sector being ever more choosy when deciding where to invest. It is likely that nationally the DMP network will have to ‘morph’ into more flexible organisations and DCMS and *VisitEngland's* new framework priorities may influence how Staffordshire should present itself.

Marketing

- The new marketing work, market segmentation, the ‘Stafford-sheer’ campaign and the focus on digital and reduction of print has been well received overall
- While Staffordshire is not yet in the premier league as a UK visitor destination it has as much, if not more actual ‘product’ in terms of attractions and things to do than many who are. However, nationally there is still low awareness and perception of Staffordshire amongst consumers and non-visitors
- There is still an apparent lack of consensus on what the Staffordshire **visitor proposition** really is and how to articulate it. No consultee referred to the previous ‘Culture, Nature, Adventure’ offer
- The ‘attract and disperse model’, using its nationally known brands and attractions will not work unless *Destination Staffordshire* is braver in their use
- **Business tourism** is recognised as important economically but still needs more marketing. Recent promotions have been supported by a wider range of businesses and the ERDF programme
- There have been major improvements in the range and impact of **social and digital media** use by the DMP and partners. Indeed, there was some discussion on whether Staffordshire should aim to become ‘the most digitally enabled county’
- The **visitor ‘app’** is felt to need considerable work to improve and promote it
- There are divided opinions about the effectiveness and impact of **PR activity** over the past three years – a closer working relationship between marketing and PR agencies is urged

Other useful comments made about marketing include:

- **Promote more to local people** – give them reasons to come to visit attractions and hospitality providers, bringing visiting friends and families with them (VFR). The value of the *Out and About* newspaper was highlighted
- **Target higher income markets** for particular products and don't be afraid to charge more to those that want and can pay for bespoke, personalised services and experiences
- Promote what's **special and distinctive** about Staffordshire more, acknowledge the importance of small and micro-businesses, the independents, not just the large, chain, corporates
- Stress the **county's location** more – between the two big population centres of Manchester and Birmingham and at the Heart of Britain
- **Day visitors** are still hugely important – even though many are now looking for 'free' visitor experiences

Product Development

- Staffordshire is quite successful in its **range of investment and growth in tourism assets** which will soon include *The World of Wedgwood*, the Middleport Pottery redevelopment, the 'high end' retail outlet development proposed near Cannock and new accommodation at major theme parks
- There has been investment and growth in visitors at key attractions such as the Trentham Estate and the National Memorial Arboretum (who are now planning further significant product development and for whom 2018 the centenary of the ending of WW1, the last year of this strategy, will be highly significant), plus a new strategy is due soon from the Canal and Rivers Trust
- More could be made of the **market towns** as independent shopping destinations, especially as no major city retail centre exists in the county
- There is still a **lack of accommodation** and limited range of choice and quality in some locations. Theme park hotels have high occupancy levels but elsewhere the levels are average and a **continued focus on increasing bed nights** is urged. There is scope to work more proactively with hotel developers to get the right quality and location of new hotel investment - including engagement of LEPS and inward investment teams
- Holiday parks and canal accommodation have been somewhat overlooked. There is also potential to market more to visitors generated by the two Universities
- Many felt the **Taste of Staffordshire** initiative should be re-invigorated and food and drink recognised more overtly as a key part of the visitor experience

- Staffordshire's water assets are seen as a major opportunity – canals, reservoirs and rivers – working with the Canals and River Trust (CRT, former British Waterways)
- Staging and promoting events remains an important way to generate publicity and visitors. New sporting events such as the Iron Man and similar major triathlons and the Tour of Britain cycle route in county provide particular opportunities
- Further work is urged on improving the quality and offer in Stoke-on-Trent as it is still poorly perceived by many from outside and indeed by SSLEP itself

Other issues or topics raised

Sustainability issues have had a surprisingly lower profile within the local tourism industry and DMP activities since the last Strategy. The Staffordshire Environmental Quality Mark (SEQM) launched in 2011 has now become a Community Interest Company (CIC). Take up of the scheme and feedback from members indicates that it is in need of reinvigorating and could be made more appealing to businesses. This is not an issue that will or should go away and views were expressed that sustainability should be built into Staffordshire's visitor offer wherever possible.

The **Staffordshire Hoard** was seen as a major opportunity in 2011 but there is frustration amongst businesses and others that despite initial national coverage it has not achieved a sustained significant national profile and thus real benefits for individual businesses, the county and the wider economy are not obvious.

The **ERDF programme** of marketing and business support was perceived as having been very beneficial. There were felt to be a few missed opportunities with some lack of communication between the delivery companies which could be easily remedied to the wider benefit of all programmes. Recruiting businesses had sometime been challenging, partly due to their lack of time and resources to participate in numerous activities, despite them being offered free of charge. There is an opportunity to recruit non-members for programmes in future and convert them into *Destination Staffordshire* members. Some businesses felt there was a need for more 'hands on' support with technical training e.g. on basic IT.

The indicative list of projects already identified as potential **bids for the next round of European funding** was well regarded by consultees and chimed with their own views on priorities.

Destination Staffordshire launched its **Tourism Awards** in 2013 which had generated considerable interest and media coverage. Business support programmes also helped increase the numbers of applicants to the *VisitEngland* award scheme.

General trends which are thought to have impacted on tourism in the county over the last four years include:

- An increasing demand for multiple short breaks, with short lead-in times.
- More User Generated Content on websites plus the whole explosion of social media

- Further increases in consumer expectations and more demanding attitudes from some
- A rapid spread in the use of, and reliance upon, technology in the sourcing and sharing of tourism information and experiences.
- The reduced value placed on AA and *VisitBritain* star ratings for accommodation
- The growth of review websites such as Tripadvisor
- A growing interest in wellness and healthy activities on holiday.
- A desire for personalised, tailored and engaging experiences, including an interest in local character and differences between destinations visited.
- More national awareness of the county and its products
- Extended family markets – multi-generational family visits are becoming more common and an increase in senior and youth markets.
- Greater diversity of ethnic groups with different product interests.
- Income inequality leading to a wide variation in holiday spending budgets.
- Money is still tight for many visitors, affecting spending and the demand for free activities

5. STRATEGY, AIM AND OBJECTIVES

Destination Staffordshire Vision

The refreshed Vision for *Destination Staffordshire* is essentially to **carry on working ever more effectively as possible in an increasingly challenging environment**. As other county tourism bodies and DMPs disappear, or are significantly weakened, the Vision is for a **continuing, strong and effective DMP supporting Staffordshire's visitor economy through fewer, more focused priorities**. Tourism businesses across the county will have a significant advantage over other parts of the country due to the activities of the DMP and the additional resources it attracts and expends.

The Vision:

***Destination Staffordshire* will deliver value and quality through everything it does, working with all willing partners across the visitor economy, strengthening collaborative achievements.**

It will enable all elements of the visitor economy, be they built, natural or cultural heritage, food and drink, attractions and accommodation, transport and infrastructure, to contribute together to the best possible experience for all visitors to Staffordshire.

Its membership base will be inclusive of the wider visitor economy and empowered to deliver innovative and effective solutions for its own businesses and thus for visitors, keeping them for longer, with greater allegiance to the county and spending more in the area overall.

Priorities

The review of the changing context, current performance and views of partners and members summarised in the previous three sections has led to a set of **reframed strategic priorities**.

Key priorities for 2015-18:

1. **Define and better articulate** the Staffordshire **visitor proposition** in all marketing and PR activities, targeting the identified key market segments and stressing the **distinctive, niche, quality and experiential** qualities and products on offer.
2. **Attract more staying visitors via improving the quality and range of accommodation stock** - in order to extend visitor stays and increase **visitor spend** - using methods and media new to Staffordshire where appropriate
3. **Continue to develop, strengthen and promote business tourism** and demonstrate its importance and value.
4. **Continue to demonstrate value for money** of the visitor economy to all local authorities and funders through regular high quality **research and advocacy**.
5. Secure new sources of **funding** and diversify income generation - such as web-based advertising and packaging income, sponsorship and joint working with Staffordshire Chamber of Commerce

6. **Communicate and up-sell** the benefits of **membership more effectively** to help increase and widen DMP membership, listening and responding to what businesses need and motivating them to become DMP advocates.
7. Adopt **'smarter' ways of working** which help to maximise reduced funding and avoid duplication, using **digital media** to its maximum

This is a time of change with a falling away of traditional support structures in parts of the UK at the same time as major technological shifts. There are new product opportunities on the immediate horizon, both major brands and smaller ones, and Staffordshire must define itself clearly and immediately to its markets in the face of massive competition for both short breaks and business markets. This may be achieved by different means which should be explored without fear or favour, such as where Staffordshire – or indeed “Stafford-sheer” - is always in the marketing ‘signature’ but where major brands may be more powerful in reaching more of the key markets than just the name of the county. The ‘message is the medium’ and whatever methods work most effectively should be employed for the benefit of all.

Its partners are well disposed to the DMP and with some resource and determination to continue to raise its game in performance and quality, it should be able to deliver these priorities and sustain a successful visitor economy for the longer game. Growing a larger membership base and thus demonstrating the cohort of industry support will be vital.

An **overall aim** and **three over-arching objectives** have been reframed for this strategy.

Destination Staffordshire - Overall Aim:

Through the collective strengths, actions, skills and product offer of all Staffordshire businesses and organisations across the visitor economy, the DMP partnership will attract more key visitor markets into and around the county, who will spend more time and money through their enjoyment of unique and compelling experiences and the highest standards of customer service. And they will in turn recommend the area to their own networks.

Objective 1. Partnership Working and Communications

To **communicate more effectively** with all members and the wider visitor economy, maximising resources, creating and sustaining successful partnership working in policy and actions.

Objective 2. Marketing and Market Intelligence

To **attract more key visitor segments**, staying longer and spending more, by promoting the right products and experiences to the right markets, based on timely and robust research and the use of effective media and messages.

Objective 3. Product Development and Visitor Experience

To enable and encourage even **better business skills and support** in order to increase the **development and promotion of new and improved visitor experiences**: to ensure visitors know about, have satisfying, first-class experiences in Staffordshire and want to recommend and return because of **excellent service, places, attractions, activities, heritage, countryside, food and drink, all easy to find and access.**

6. ORGANISATION AND DELIVERY

The success of this refreshed strategy will depend on the efficacy of the delivery of the recommended series of actions and the buy-in of both members and external and internal partners. Consultations clearly revealed a desire for a **slimmer, less complex structure**, with relevant topic-specific groups having a clear remit with more 'clout'. This would engender better attendance with the expectation of more impact by businesses. The organisation structure proposed below includes **three Action Groups** in addition to the DMP Board and existing Secretariat that provides the support mechanism to the Board. The suggested remit and a main overall target is set out below along with some specific new ideas aimed at creating an upwards shift in the culture of the membership as a whole and in the Board itself.

In reality there will always be overlaps between topics and groups, which is as it should be, creating a sense of ownership and involvement with all activity undertaken by the DMP. Members should be seen as partners and thus invested in the overall aims of the DMP, following what might be called the 'John Lewis model'. Partners in return must reciprocate by ensuring that they too communicate with and inform the DMP of relevant developments and other news and PR opportunities in a timely manner. In short that *'we are all in this together'*.

DMP

The **DMP Secretariat** and **Board** will thus between them take overall responsibility for

- Strategic engagement with partners including LEPs, *VisitEngland*, politicians, other local authorities, major bodies, the business sector etc
- Partnership working wherever possible, in a 'coalition of the willing'
- Funding strategy and procurement, working with public and private sector partners where relevant
- Advocacy
- Championing the DMP and the visitor economy in general
- Expanding the membership
- Improving communications with members and with external stakeholders

These **last two items** will specifically be the responsibility of DMP staff and also of relevant tourism officers, reporting to the Board. We recommend that a simple communications plan and target membership recruitment should be established each year, as recommended in the last Strategy.

Funding has in recent years been led by a task and finish group, mostly led by local authority officers with the relevant specialisms. It is recommended that over the next 12 months at least that this arrangement should continue so as to explore all funding opportunities and to pursue funding bids to facilitate and enable the delivery of this strategy.

Board meetings will normally be held four times a year, plus the Annual Conference but members and especially Action Groups, must be active in between these meetings too. Sufficient time should be allowed for Board members to digest papers before meetings, especially where significant decisions need to be taken.

Board members should act as **DMP Champions** - maybe to the point of having a lapel badge/carrying a simple application form that they can always give to people they meet or know as and when appropriate. In short never let an opportunity pass to recommend or involve a potential ally or partner. Existing DMP members may be willing to do the same and there could be the opportunity to incentivise them via a financial inducement such as a reduction on membership or other subsidised member benefit, free tickets to certain attractions etc.

In addition we recommend that all Board members, and particularly new members, should be given a formal 'Directors briefing' using a format based lightly on that of the Institute of Directors: the aim of this is to ensure that all board members have the necessary understanding of the function, value and volume of the Staffordshire DMP work as well as UK and English tourism and of the roles of *VisitEngland*, *VisitBritain*, the Arts Council, LEPs and others. This will then provide a good level of knowledge when important discussions ensue and decisions need to be taken and increase the sense of belonging to a good 'club' with a good track record of achievement. Some organisations, such as the Heritage Lottery Fund, produce a small credit-card sized *aide memoire* with relevant **facts and figures and key messages** for their Trustees and Committees. This could be a useful, cost-effective exercise for Enjoy Staffordshire – perhaps even attractive to a suitable sponsor!

Action Groups

Three Action Groups are proposed, plus the continuation of the Funding Task and Finish Group.

All three main groups need to incorporate **capacity building and business support** actions. This is a cross-cutting theme needed to future-proof the industry and improve quality across the sector as a whole. Local Authority tourism officers will continue to play important roles across the action areas and it is anticipated and hoped they will input and lead action according to their agreed responsibilities.

1. Marketing Action Group

Responsible for:

- Market intelligence and research
- Delivery of the Marketing Plan
- Marketing sounding board, information and feedback
- Social media development - ensuring businesses are fully aware of their opportunities and keeping up to date with and exploiting to the maximum all new digital development

- Embedding Visitor Information into social media planning and content and marketing delivery
- PR - feeding storylines up and out to ensure members take full advantage
- Disseminating market intelligence information to businesses and to help them maximise what it tells them and exploit opportunities
- Identifying more opportunities for visitors to spend in county
- Travel Trade liaison – liaising, where overnight stays are involved, with the Business Tourism Group
- Festivals and Events – promotion of existing and attracting new events and festivals
- Identify areas where capacity building is required in marketing

Suggested targets for group: to increase the PR AEV and the perception index of the county over the next 3 years using the RH Associates 2014 research as baseline. This in turn will attract more of the key markets producing more value.

2. Product Development and Visitor Experience Action Group

- Business support – highlighting needs and solutions - capacity building and training for the sector especially in yield management (relating to the lack of growth in spend), customer care and IT skills/social media performance
- Identifying and packaging significant new product opportunities and fed to the Marketing group to be wrapped into the Staffordshire offer
- Countryside experience and opportunities, activities, heritage and cultural experiences
- Infrastructure and working with public sector on issues affecting tourism including transport, planning, signposting etc
- Sustainability and SEQM scheme
- Food & Drink - reviewing and rejuvenating Taste of Staffordshire where possible and finding new ways to engage food and drink sectors
- Exploit the Market towns offer and independent retail leisure visits across the county .e.g. distinctive crafts, arts, food and drink, etc

Suggested target for group: To increase the Staffordshire rating in the *VisitEngland* TNS Survey by 10 points over the next 3 years.

3. Business Tourism Action Group

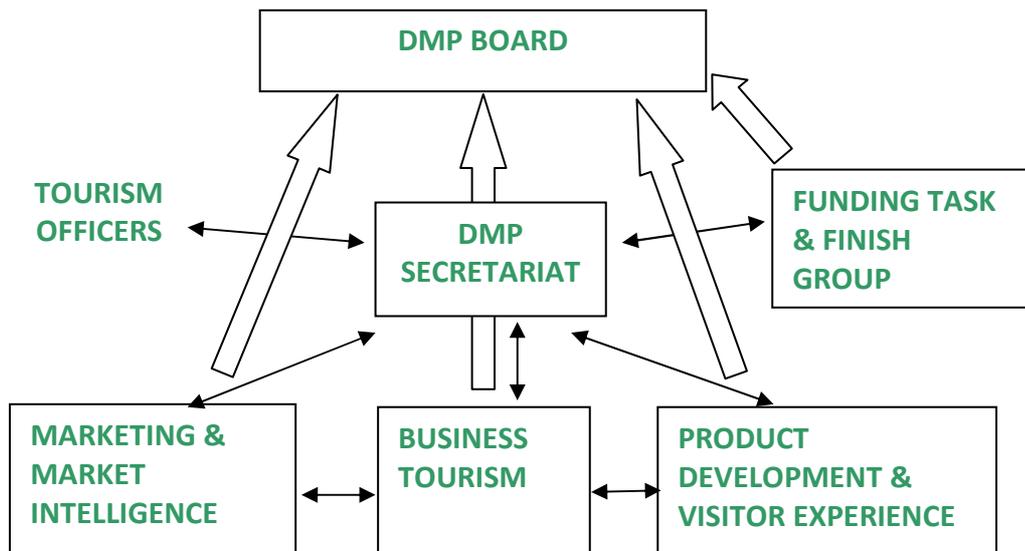
Responsible for:

- Working with the MICE industry to increase volume and value of business tourism
- Working with hotel developers and planners to attract the hotels that are needed in the right places
- Integration with marketing and social media content
- Business support and skills to grow the market, improve perception of Staffordshire as a business tourism venue
- Advocates and champions to promote the Staffordshire business tourism offer and experience across the whole county
- Travel Trade – liaising, where overnight stays are involved, with the Marketing Group
- Cross cutting links with food and drink sector especially within the supply chain

Suggested target for group: To increase Associations business and conversion of numbers of enquiries to actual business by a realistic target percentage to be agreed by the group, and to gain one new permission for a 4* hotel ideally in Stoke

The suggested structure below indicates how these would relate to each other. The arrows are indicative – in reality all groups will need to communicate and work with all the others.

Destination Staffordshire Structure



7. DESTINATION STAFFORDSHIRE ACTION PLAN 2015-2018

This Action Plan is structured around the **three Destination Staffordshire objectives**. It links easily to the proposed organisational structure – Objective 1 actions to be delivered by the DMP Secretariat with Board members also helping in an active supporting role, Objective 2 by the Marketing Action Group and Objective 3 by the Product Development and Visitor Experience Group. A separate group is proposed to deliver the Business Tourism actions (3.6) due to the distinct nature of the market and MICE industry.

NOTE: At this stage, with some marketing and business support programmes still running, but prior to any new European or other funding bids and with a General Election imminent, it is not yet possible or useful to add new KPIs or specific detail regarding partners to implement actions. New challenge funds for tourism are being launched at the time of this report and there is still a degree of uncertainty regarding the European funding programme. The timescale is the period of the Strategy and the aims are set for achievement by 2018. Creating the new **Action Groups** will in itself determine the ‘willing partners’ and any new funding will set any new KPIs.

Actions	Importance
<p>OBJECTIVE 1. PARTNERSHIP WORKING AND COMMUNICATIONS</p> <p>Target: to grow membership by 15% from 2014 numbers over the next 3 years and achieve ‘good’ ratings for communication from the membership and partners when surveyed in 2018.</p>	
<p>1.1 Working ‘smarter’</p> <ul style="list-style-type: none"> • Maximise diminishing resources at every opportunity and minimize any parochial considerations • Clarify key delivery responsibilities of DMP staff and partners including tourism officers’ discrete areas of work • Reduce any duplication between county, city and districts 	High
<p>1.2 DMP organisation and style</p> <ul style="list-style-type: none"> • Sustain a strong, representative and effective Board, including the use of directors’ briefings and other team building mechanisms • Set up the proposed action groups to deliver this strategy, recruiting appropriate members who can collectively deliver action, with strong, committed leads • Monitor action group effectiveness and review as necessary 	Medium
<p>1.3 Funding</p> <ul style="list-style-type: none"> • DMP Funding Task & Finish Group to pursue and secure funding to implement Strategy – indicative list of potential projects broadly supported in this consultation • Diversify income generation such as web based advertising, packaging and sponsorship etc • Increase membership income 	Very high
<p>1.4 Communications and Engagement</p> <ul style="list-style-type: none"> • Agree communications plan and sharpen up delivery of DMP communications using more focused email, e-newsletters, circulating minutes/briefings, social media and the annual conference • Ensure all partners active ‘buy in’ to this strategy’s Priorities 	Very high

Actions	Importance
<ul style="list-style-type: none"> • Sustain productive relationships with key partners in and around the county especially the LEPs, the National Forest and Visit the Peak District • Boost networking, engagement with the DMP and business collaboration through local networking and communications and other business networks especially Staffordshire Chamber of Commerce • Keep Board, partners, LEPs and other opinion formers informed and acting as advocates for tourism using briefings, research findings and DMP events. 	
<p>1.5 Expand Membership</p> <ul style="list-style-type: none"> • Review and refresh the membership offer, make it concise, sharp and target specific sectors giving businesses reasons to join ('What's in it for me') • Trial ways of incentivising members e.g. discounts for recruiting others and encourage all members and staff to act as ambassadors for the DMP 	Very high
<p>OBJECTIVE 2. MARKETING AND MARKET INTELLIGENCE</p> <p>Targets: To increase the PR AEV and the perception index of the county over the next 3 years using the RH Associates 2014 research as baseline. To attract more of the key markets and enable greater related spend. To improve ranking in English Tourism Social Media Index</p>	
<p>2.1 Marketing propositions</p> <ul style="list-style-type: none"> • Better define and articulate the Staffordshire visitor proposition in all marketing and PR activities • Further develop the segmented marketing approach and 'Staffordsheer' campaigns, including those for Travel Trade markets • Emphasise the distinctive, niche, quality and experiential qualities of Staffordshire tourism products, using distinctive imagery 	Very high
<p>2.2 PR and Social Media</p> <ul style="list-style-type: none"> • Further strengthen PR and social media content and synergy focusing on Staffordshire products, people and experiences • Continue to monitor impact and value of PR and social media activity • Manage social media channels, targeting niche audiences and priority market segments • Research good practice and new ideas from other areas, in the light of the recent <i>English Tourism Social Media Index</i> in which Staffordshire is rated 2nd in the West Midlands; aim to be in the top 12 in England by 2018 • Encourage greater use of social media amongst members to boost impact and reach 	Very high
<p>2.3 Website</p> <ul style="list-style-type: none"> • Continue to improve and develop look and functionality of website, including ensuring an effective mobile version • Enable active and dynamic links to social media activity especially building more UGC recommendations, content and participation • Expand and enhance content on particular activities e.g. walking and cycling • Mitigate impacts of new state aid ruling on websites • Improve, update and promote the Enjoy Staffordshire 'app' • Build on the new packaging options and ensure plenty of relevant PR and social media outflow and presence • Ensure linkages to Business Tourism and content specific to Travel Trade 	Very high

Actions	Importance
<p>2.4 Print</p> <ul style="list-style-type: none"> • Focus on print matched to purpose, product and person – reduce or discontinue that which does not have a clear purpose and increase print run and distribution on that which does • Ensure most print is available as pdfs for online downloading • Monitor response to refreshed Visitor Map in 2015 • Commission new map for use in print and online, highlighting sub destinations, key attractions and making it more attractive as well as practical • Continue the Out & About newspaper 	Medium
<p>2.5 Tourist Information</p> <ul style="list-style-type: none"> • Continue implementing the 2013 Visitor Information Strategy recommendations linked to ongoing social media development • Continue adjusting provision with the transition from physical Tourist Information Centres to hybrid information locations and online information provision • Monitor new leaflet racks and stands being launched in 2015 	Medium
<p>2.6 Research</p> <ul style="list-style-type: none"> • Sustain ongoing research to guide marketing and product development priorities and activity and monitor its effectiveness • Continue participation in the VisitEngland TR*M survey • Commission a new visitor survey and ensure good data on visitor perceptions and non visitor awareness • Consider additional research into niche markets 	Very high
<p>2.7 Festivals and Events</p> <ul style="list-style-type: none"> • Promote Staffordshire Festivals and Events, maximizing their potential to raise awareness and drive visits • Prioritise development and securing of major events across a variety of themes/venues (artistic, sporting, music, culture, heritage, etc) • Review recommendations of previous events strategy to identify further ways to raise the profile of Staffordshire as a venue for events and to generate economic benefits • Ensure events connect with local accommodation and other service providers to encourage longer stays and greater visitor spending 	Medium
<p>OBJECTIVE 3. PRODUCT DEVELOPMENT AND VISITOR EXPERIENCE</p> <p>Target: To increase the Staffordshire rating in the <i>VisitEngland</i> TNS Survey by 10 points over the next 3 years</p>	
<p>3.1 Product development</p> <ul style="list-style-type: none"> • Set up a new Action Group focusing on improving the tourism product, identifying and developing attractive visitor experiences and tackling destination management issues (remit to include all of section 3 in this strategy) • Progress product development especially in rural tourism – through walking, cycling and waterways and promoting key projects such as HLF programmes • Identify opportunities for joint working, funding and commercial partnerships e.g. exploiting better the Staffordshire Hoard to the benefit of the county 	Very high

Actions	Importance
<p>3.2 Destination Management</p> <ul style="list-style-type: none"> Identify issues and infrastructure improvements needed and use DMP and local authority influence to gain actions where needed Consider commissioning a review of visitor signage and prioritized plan to upgrade signage over the next few years Encourage investment in interpretation and routeways such as towpaths 	Medium
<p>3.3 Taste of Staffordshire</p> <ul style="list-style-type: none"> Relaunch and refocus a smart/slimline, lower cost version of Taste of Staffordshire, stressing the importance of the food and drink categories in the Staffordshire Tourism Awards as an entry into the Visit England Excellence Awards. Offer clear opportunities for producers, providers and visitors to benefit and add value – including working with the Business Tourism sector Use distinctive imagery and wording to highlight local products, dishes and eating experiences 	Medium
<p>3.4 Business Support</p> <p><u>A cross cutting theme underpinning all actions</u></p> <ul style="list-style-type: none"> Explore with partners more local delivery solutions for business support – in areas of marketing, business tourism and product development Source funding for tourism business training needs such as marketing, social media and use of IT development 	High
<p>3.5 Sustainability and Staffordshire Environmental Quality Mark (SEQM)</p> <ul style="list-style-type: none"> Using business support programme to refresh relationship with SEQM CIC to improve business friendliness of scheme and its delivery in Staffordshire Use business support programme to boost recruitment to a wider range of businesses – whilst recognising its likely appeal to ‘top performers’ Enlist marketing to help promote value of the scheme to visitors 	Medium
<p>3.6 BUSINESS TOURISM</p> <p>Led by the Business Tourism Action Group</p> <p>Target: To increase Associations business and conversion of numbers of enquiries to actual business by a realistic target percentage to be agreed by the group, and to gain one new permission for a 4* hotel ideally in Stoke</p>	
<ul style="list-style-type: none"> Seek greater co-operation and investment to boost business and conference tourism across the whole county Work with MICE industry to increase volume and value of business tourism Work with hotel developers and planners to attract the hotel developers that are needed in the right places Integration with marketing and social media content Business support and skills to grow the market, improve perception of Staffordshire as a business tourism venue 	High

APPENDIX 1 STAKEHOLDER CONSULTEES

Thanks are due to all those who gave up time to give the consultants their views either through one to one conversations or by attending the workshop held in February 2015. They include:

Mark Owens	3XP Tours
Mark Kerrigan	Alton Towers and SSLEP
Simon Papprell	Canal and River Trust
Karen Wyatt	Canal Cruising
Ruth Hytch	Cannock AONB
Cllr McCardle	Cannock AONB
Gay Lawrence	Colton House
Ron Lawrence	Colton House
Bob Keys	Drayton Manor Park
Alexa Stockham	Drayton Manor Park
Terrie Beardsmore	Dunsley Hall Hotel
Ian Slade	Entrust - Shugborough
Mark Smith	Entrust - Shugborough
Chris Lewis	The Lewis Partnership
Teresa Fox-Wells	Middleport Pottery
Claire Furnell King	Moat House, Stoke
Richard Drakeley	National Forest
Sarah Oakden	National Memorial Arboretum
Michelle Fullard	National Trust
Joanne Halliday	Newcastle under Lyme BC
David Breakspeare	Oakland Holiday Park
Adam Breakspeare	Oakland Holiday Park
Paul Ridgers	RH Associates Marketing
Kate Watkins	Seal PR
Emily Whitehead	Simply Staffordshire
Julie Nash	South Staffordshire College
Cllr Mark Winnington	Staffordshire County Council
Jon Fairburn	Staffordshire University
Guy Corbett Marshall	Staffordshire Wildlife Trust
Heather Sheldon	Stoke College
Samantha Hall	Stoke City Council
Tim Sharman	Stoke City Council Tourism Team
Claire Williams	Stoke/Staffs Conference Bureau
Sue Gill	Tourism South East
Michael Walker	Trentham Estate
Amanda Dawson	Trentham Estate
Sue Wiper	Trentham Monkey Forest
James Berresford	VisitEngland
Julie Arnold	Waterway Images
Andrea Webster	Weston Park
Ian MacLaughan	Winning Moves
Ivor Robinson	Wyndale B&B

APPENDIX 2. THE STRATEGIC CONTEXT

2.1 Introduction

In this section a brief examination is made of a range of national, county and cross-border strategies and policy documents as they relate to the visitor economy and impact upon the forward planning for the sector in Staffordshire. In the majority of cases these are new documents, written since the previous 2011 production of the predecessor Staffordshire strategy.

2.2 Visit England's Strategic Framework for Tourism 2010-2020

The national context has been **VisitEngland's Strategic Framework for Tourism 2010-2020**. This set out a vision to maximise tourism's contribution to the economy, employment and quality of life in England. Its ambition was to achieve 5% growth in value year on year until 2020. The emphasis was on developing and driving forward a collaborative strategy with tourism stakeholders working together to realise continuous improvements in key areas and four interdependent objectives:

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

The Peak District, including parts of Staffordshire Moorlands, has been one of the 39 English 'Attract Brands' which VisitEngland has prioritised to focus marketing budgets and impact.

VisitEngland has embarked on a midway review of their Strategy and Framework with the aim of refreshing its ambitions in the light of changing economic and social circumstances in the national as well as international markets.

A 'refreshed growth strategy' was published in consultation form in March 2015. The vision for tourism in England in 2020 has been reframed as: **A resilient and globally competitive tourism industry that acts as a key driver of the economy and local prosperity across England**

The target remains as 5% growth in value, year on year, to 2020, with 225,000 jobs to be created by 2020.

There are now three strategic objectives:

- **To increase the contribution of tourism to the English economy**
- **To increase tourism employment and local prosperity**
- **To strengthen the competitiveness of businesses and England's tourism offer**

Plus five priorities:

1. Investing in tourism products and experiences in line with market trends and strategic needs
2. Attracting and retaining motivated people and developing their skills
3. Increasing the visibility and understanding of England's tourism offer
4. Overcoming barriers to business competitiveness and investment
5. Investing in the infrastructure and environment on which tourism growth relies.

Structural, social and lifestyle changes that VE identify as providing opportunities include:

- Demographic changes, with an increase in senior and youth markets.
- Stronger inter-generation family ties and social bonding, with demand for small group facilities.
- Greater diversity of ethnic groups with different product interests.
- Income inequality leading to a wide variation in holiday spending budgets.
- An increasing demand for multiple short breaks, with short lead-in times.
- A desire for personalised, tailored and engaging experiences, including an interest in local character and differences between destinations visited.
- A growing interest in wellness and healthy activities on holiday.
- A rapid spread in the use of, and reliance upon, technology in the sourcing and sharing of tourism information and experiences.

The emerging focus of VE's activity is around "Great Destinations" where the visitor can have "Great Experiences". The focus is likely to be on fewer, bigger, excellent products around England. If this is carried through it will require *Destination Staffordshire* to up its game even further in order to compete with the bigger players. It is also likely that Rural Tourism will cease to exist as a separate entity but will merge with the wider countryside "experience".

A product development 'Challenge Fund' has been recommended with further details of this due later in the year.

2.3 Staffordshire County Council Tourism Strategy 2012-14

At a County level **Staffordshire County Council** produced its own **Tourism Strategy**, after the DMP's had been completed in 2011, to cover the period **2012-2014**. Tourism is valued as contributing to the County's priority outcomes of Prosperity (with 5% of employment), and of Health and Community. The Council supports tourism directly through funding expertise, support for the DMP itself and other promotions. The strategy set out a new focus for its relationship with *Destination Staffordshire* its key delivery partner; in particular to guarantee resources for web service provision and brand marketing that underpin the promotion of Staffordshire as a tourism destination.

The strategy particularly urged encouraging private sector investment in accommodation, through identifying potential development sites for hotels and targeting inward investment from developers. The aim being to increase numbers of visitors staying overnight and for short breaks, increased occupancy levels and further investment in the accommodation sector

The visitor economy would help the Council meet its aspirations and outcomes within its **own** Strategic Plan, 2011-2016, specifically:

- Staffordshire's economy prospers and grows, together with the jobs, skills, qualifications and aspirations to support it.
- Staffordshire is a place where people live longer, healthier and fulfilling lives.
- Staffordshire's communities can access, enjoy and benefit from a range of learning, recreational and cultural activities.

Tourism has the capacity to boost the local economy, generate extra jobs, inward investment, and improve local people's quality of life.

The Strategy includes recommendations on the Council's relationship with *Destination Staffordshire* and how many of its own departments can help deliver the strategy. It emphasises the need for a clear business case for each activity, monitoring of outcomes and value for money from investment.

2.4 Staffordshire Visitor Information Strategy 2013 - Team Tourism Consulting

Four **main market segments** have been identified as target groups for information provision in Staffordshire. These are: empty nester / early retired couples, families with children aged 3-16, pre-family friends and couples, and non-discretionary visitors (business, VFR etc). These groups have distinct characteristic and information needs, and have different preferences for the way they access their information.

The overall **aim** of the **Visitor Information Strategy** is to improve awareness and presentation of Staffordshire products amongst actual and potential visitors and so...

- Increase visits across the county
- Have visitors staying longer and visiting more places
- thus also improve the visitor experience and increase word of mouth recommendations.

The Strategy is guided by various key principles. These include:

- A need to cater for different markets
- An emphasis on digital delivery
- Interventions that add value to information provided by organisations beyond *Destination Staffordshire* and its partners
- Recognising the continued importance of traditional channels
- The need, given the diversity of Staffordshire, to make links for the visitor between areas and attractions
- Recognising the difficulty of consistent delivery, concentrate on various cross cutting county actions, and focus, for destination based activities, on a finite number of areas
- Focus limited resources on a limited number of actions that will be most cost-effective.

Three actions areas are recommended:

1. **Online** - using online platforms (like TripAdvisor and WAYN) effectively, monitor and engage actively in social media discussions particularly Facebook, Twitter, FourSquare, recruit Digital Ambassadors, to be actively respond online and encourage UK and England Guide books and websites to feature Staffordshire tourism opportunities.
2. **Destinations** - improve arrival points such as stations and car parks; use augmented reality and QR codes to be used to enhance information and interpretation and upgrade signage.
3. **People** - Businesses and visitor facing individuals to be skilled and equipped to provide information to visitors.

2.5 Staffordshire Tourism Digital Framework 2013

The Visitor Information Strategy was accompanied by a short **Staffordshire Tourism Digital Framework** document. This has the objective of enabling *Destination Staffordshire* to operate in the most cost-effective way in leading and delivering the overall destination strategy, delivering the best return on investment. Plus using resources to establish strong digital foundations (in terms of systems, content and skills) that will have long term benefit to tourism in Staffordshire and enable the industry and tourism stakeholders to operate, collaborate and develop effectively, with greatly reduced future dependency on DS.

It is clear from this range of economic, rural, tourism, marketing and visitor information based strategies that a large amount of thought has been given to the forward development of the visitor economy across Staffordshire and the overlapping areas of the county that have links with the Peak District to the north, and Greater Birmingham to the south. These priorities and issues have influenced the tourism strategy development for Staffordshire.

2.6 Stoke-on-Trent and Staffordshire Local Enterprise Partnership's Strategic Economic Plan 2014

The key document which will direct much investment over the next five years or more is the **Stoke-on-Trent and Staffordshire Local Enterprise Partnership's Strategic Economic Plan 2014** (SSLEP SEP). The Plan's vision is for Staffordshire to be 'an economic powerhouse driven by the transformation of Stoke-on-Trent into a truly competitive and inspiring core city and by accelerated growth in our county corridors and urban centres.' Priority sectors are five advanced manufacturing sectors: applied materials, agri-tech, aero-auto, medical technology and energy generation. However, the plan recognises the importance of tourism and that it employs 10% of employees across Staffordshire and Stoke as well as helping to improve health and well-being through an active leisure offer. Tourism is identified as a 'barometer sector' along with professional services. The Chairman of *Destination Staffordshire*, Mark Kerrigan of Alton Towers, sits on the LEP Board.

The Plan identifies that national attractions such as Alton Towers, Drayton Manor, Cannock Chase, the National Forest and the Peak District can draw in day visitors and help retain families living locally. The sector's priority is to make more consumers aware of Staffordshire as a destination for a short break, so encouraging greater volume of overnight stays, increased revenue and more employment in the industry. Stoke is a high priority, but whilst inward investment is a priority through a 'Red Carpet' programme little is made of tourism's impact on the image and perception of Staffordshire.

2.7 Stoke-on-Trent and Staffordshire LEP EU Structural and Investment Funds Strategy (EUSIF) 2014

The **Stoke-on-Trent and Staffordshire LEP EU Structural and Investment Funds Strategy (EUSIF) 2014** has been developed in tandem with the Strategic Economic Plan. The two documents are designed to sit alongside each other, reflecting the shared strategic objectives and priorities of the LEP and partners across the area. European Growth Programme allocations are:

- ERDF and ESF funding for Stoke-on-Trent and Staffordshire LEP of £138.4 million

- An additional £27.4 million ERDF and ESF funding via the Greater Birmingham and Solihull (GBS) LEP allocation, administered in partnership with Stoke-on-Trent and Staffordshire LEP for the area where the LEPs overlap in south Staffordshire.
- EAFRD funding for the Stoke-on-Trent and Staffordshire LEP of £3.13 million (for rural areas). (P6)

One of the EUSIF ambitions is that Staffordshire will be 'a more attractive place to live, work and visit: renowned for its vibrant and diverse places, strong cultural and leisure offer in Stoke on Trent complemented by visitor attractions and a high quality environment across the LEP area'.

The four priorities for investment are:

- Innovation (research, infrastructure and networks) (£23m)
- SME competitiveness (£37m)
- Place and environment (energy and infrastructure) (£22.5m)
- Skills, employment and social inclusion (£55m)

Particularly relevant for tourism are:

- 'Make it Stoke-on-Trent' and Staffordshire 'Red Carpet' inward investment support service
- Enhancing green infrastructure including leisure assets such as cycle routes and waterways
- Skills programmes which include tourism skills eg programmes at Stoke College.

The EAFRD funding includes support for tourism activities in rural areas such as SME competitiveness, business support, investment in green infrastructure and leisure routes and funding for the reuse of empty commercial space in villages. The DMP has started to draw up its list of potential projects against the EU funded programmes and this strategy takes this into consideration.

2.8 Staffordshire LEADER Local Development Strategy 2014

Most of rural Staffordshire is covered by the EU LEADER programme. The **Staffordshire LEADER Local Development Strategy 2014** sets out the priorities for funding. The LDS proposed budget was for a programme of £2.7 million with £2.2m to be spent on projects of which £900,000 will be allocated to support for micro and small enterprises and farm diversification, £450,000 for support for rural tourism and £112,000 for cultural and heritage activity. (In early 2015 it was announced that Staffordshire had been successful and an overall budget of £2.24m has been awarded by Defra.)

Local priorities for tourism are to:

- Improve tourist accommodation offer by upgrading existing accommodation and supporting a range of new, high quality accommodation.
- Examine ways to extend the tourism season by working with local tourism businesses, destination management and local attractions.
- Use of social media, utilising superfast broadband and other marketing initiatives including collaborative approaches and destination marketing

- Restore, repair, conserve, enhance and interpret small scale built and natural heritage
- Develop unmanaged woodland to provide economic opportunities and benefits, including tourism related activities.

2.9 Staffordshire Hoard Trail 2014

- **The Staffordshire Hoard Trail** links Lichfield, Tamworth, Stoke-on-Trent and Birmingham. A marketing strategy was produced in late 2014 which states that the Hoard is a find of international significance, capable of becoming an iconic attraction for Staffordshire and the West Midlands given a sustained effort over the next 5-10 years by a cross-regional partnership. Video, audio, story-telling and dramatic displays are recommended, plus festivals to promote the Hoard Trail and motivate visits. However there is little detail on how the concept of the trail should operate in practice and how each site links to the others, motivating multiple visits.
- The strategy proposes dedicated marketing spend of £1.5m over the next five years on promotion, developing the visitor experience, and developing and promoting festivals. It is estimated this level of investment could attract an additional 350,000 visitors to the Staffordshire Hoard Trail spending £72m in its host destinations. Two priority market segments
 - ‘cultural boomers’ and ‘contented mainstreams’ - have been identified as best prospects, capable of delivering additional staying visits from the UK and internationally. These market segments will be attracted to other visitor experiences within the host venues and destinations
 - from the ceramics collection in the Potteries Museum & Art Gallery, the St Chad Gospels in Lichfield, the military history in Tamworth, through to Birmingham’s Jewellery Quarter - and these can be used to enhance the offer and extend stays and spend.

2.10 South Staffordshire District Council Tourism Strategy 2014-17

South Staffordshire District Council also has its own **Tourism Strategy 2014-17**. Priorities include;

- Promoting places to visit, play and enjoy as a tourist destination
- Promoting inward investment and sustaining local business and employment
- Improving people’s health and well being.

The Strategy has four main objectives:

1. **Business Support** - encouraging tourism related development and ensuring businesses have the right skills and knowledge to increase productivity, grow and prosper.
2. **Visitor Information** - enhancing visitor information to raise awareness of South Staffordshire, increasing visitor numbers, spend, and overnight stays.

3. **Visitor Facilities and Experience** - encouraging and supporting businesses to attain recognised quality accreditation schemes, improve accessibility, and develop their visitor experience
4. **Market Intelligence** - understanding who the visitors are and how to develop South Staffordshire to increase visitor satisfaction and enjoyment to meet changing needs

Activities are proposed to focus on accommodation, events/festivals, business tourism and venues and sustainable tourism.

2.11 Greater Birmingham and Solihull Visitor LEP Strategic Economic Plan (SEP) 2014

Greater Birmingham and Solihull LEP Strategic Economic Plan overlaps with the SSLEP Strategic Economic Plan in the southern and eastern districts of Staffordshire, especially Lichfield District, bordering the conurbation. While the Plan states that the area *'has the most developed cultural infrastructure outside the capital, making it one of the most significant leisure and tourism destinations in the country'* it includes very few tourism-related priorities or projects other than identifying that Birmingham Airport is vital for international connectivity, including links to growth markets and for conference, business and leisure tourism. The Plan focuses on infrastructure projects, enterprise zones, and skills. There is one specific tourism skills project for a skills excellence hub on food technology. It is worth noting that East Staffordshire local authority is not fully engaged with Destination Staffordshire and is not a member of SSLEP, but is a member alongside the larger players in the GBSLEP.

2.12 Greater Birmingham and Solihull Visitor Economy Strategy Framework 2014

Tourism across the **Greater Birmingham and Solihull area** is addressed through the **Visitor Economy Strategy Framework 2014**. This strategy identifies four 'pillars':

- **Doing Business** - reclaiming Greater Birmingham's position as the premier conference and exhibition destination in the UK; by creating facilities, marketing and customer service that meets the needs of customers in the 21st century, by targeting and growing international conference and exhibitions
- **Going Global** – focusing marketing activity on growing leisure visits from six countries which are also a priority for inward investment: Germany, France, USA, Australia, India and China
- **Cultural Showcase** - to make much more of the outstanding cultural assets of Greater Birmingham that have the potential to drive visitors and position the area strongly as a place to live, work and invest.
- **Going Local** - playing to the strength of central location, its large population catchment and investment in its attractions to grow the volume and value of day visitors. This focus will also deliver excellent customer care, engender local pride and encourage people to choose tourism as a career option.

The pillars work across four themes:

- **Entertainment** – Festivals, Performances, Attractions, Sport

-
- **Pleasure** – Shopping, Eating, Strolling, Socialising, Enjoying the countryside
 - **Enlightenment** – Galleries, Museums, Heritage, Knowledge
 - **Business** – Conferences, Meetings, Exhibitions

Southern Staffordshire is identified as having opportunities for pleasure and enlightenment in particular. Specific projects identified include the Staffordshire Hoard Trail and plans for a major new visitor centre for the National Memorial Arboretum.

Underpinning activity includes:

- Excellent gateways, welcome and the visitor journey
- Improved connectivity within the area and excellent public transport
- A wider range of hotels to meet the needs of growth markets
- Knowledge sharing and using intelligence about the visitor economy

An analysis of the potential economic impact across Greater and Solihull which could be generated through this Visitor Economy Strategy was undertaken and estimated the potential for £210m to £390m of additional Gross Value Added GVA (direct and indirect) and 4,700 to 9,000 additional jobs by 2020, if the targeted increase in visitors is secured. This included:

- £30m to £43m GVA from increased domestic business trips
- £13m GVA from the development of a new conference venue per annum
- £6m GVA from increasing the number of conferences per annum
- £11.0m to £26.2m GVA from extra international holiday trips from key markets
- £81m GVA from four signature events
- £151m to £305m GVA from increasing the volume and value of domestic day trips.

2.13 Derbyshire Strategic Economic Plan 2013

Staffordshire includes a large section of the Peak District. The Strategic Economic Plan covering Derbyshire, whilst it does not overlap like the Greater Birmingham LEP, is very useful and contains priorities and recommendations which are of relevance to the eastern areas of Staffordshire. **D2N2: The UK's Most Inspirational Postcode** produced by **Derbyshire Nottinghamshire LEP** contains the vision that the area will become 'a more prosperous, better connected, and increasingly competitive and resilient economy, at the heart of the UK economy, making a leading contribution to the UK's advanced manufacturing and life sciences sectors and generating significant export earnings for UK plc. We will create a D2N2 which provides a great place to live, work and invest.'

The visitor economy is one of eight priority sectors in the plan and one of the ambitions is that 'by 2023 D2N2 presents a world-class destination of choice for visitors and investors alike.' This Strategic Economic Plan has much more detail on tourism than the other two. It identifies the need for capital investment in visitor attractions; the potential to increase employment by exploiting new opportunities and markets, such as the growth of cycling as a leisure pursuit; and the development of key natural and heritage assets. Opportunities include business tourism, festivals and events, tactical marketing, branding and gateways and hubs.

Key programmes proposed include:

- Business Growth Fund – supporting businesses to make capital investments to accelerate growth and enable innovation, and sustaining visitor economy marketing campaigns.
- Sector Skills Action Plans – to shape skills provision within each priority sector and ensure employers have access to the skilled workforce they need to drive their businesses forward.
- Supporting our market towns and rural areas – as local centres for employment, shopping and services, and key centres for tourism, including innovative and flexible public transport solutions.

Key themes for the following three years were identified:

2014 – a Year of Cycling

2015 – a Year of Culture – The Grand Tour

2016 – World Class-World Heritage: 250 years of innovation

The Plan includes proposals for the Peak District for infrastructure and further development of the National Park as a ‘World Class Destination’ including measures to improve the public realm and enhance visitor experience in the towns as key gateways to the Peak, and development of the case to support transformation of Buxton as one of England’s leading spa towns.

All of this naturally has positive impact for Staffordshire’s part of the Peak District and its nearby market towns.

2.14 Derbyshire Visitor Economy Review and Investment Study 2014

The **D2N2 LEP** also produced a **Visitor Economy Review and Investment Study** in 2014. It includes recommendations for the Peak District and southern Derbyshire which are relevant for Staffordshire and could involve cross border working:

- Transport connectivity - an area wide public transport improvement plan which addresses the specific needs of the visitor economy should be developed. The plan should consider the development of tourist bus services as a specific action.
- Accommodation investment and quality - a hotel investment strategy for the LEP area.
- Support for the development of anchor attractions
- Destination Development Plans for key towns including Ashbourne, Bakewell, Buxton, Castleton, Holmfirth and Matlock.
- Connectivity between destinations and nearby attractions - SME support programme aimed at clusters of local businesses to support small scale developments, training, promotion
- Markets and independent retail
- Local pubs and micro-breweries - promotion and support
- Broadband - a plan to identify and address connectivity ‘black spots’
- A consistent brand for the Peak District (*this is of value to Staffordshire and its proportion of the Peak District*).

2.15 The National Forest Destination Development Plan and Management Plan 2015

A Destination Development Plan (DDP) and Management Plan for The National Forest is under consultation and production in spring 2015, with the visitor economy being seen to be in healthy condition and a valuable contributor to economic development across the National Forest. This new strategy replaces the **Vision and Action Plan for Sustainable Tourism in the National Forest, 2009**. Tourism is recognised as an important part of the wider economy across The National Forest (TNF), contributing £267 million in 2007 and supporting 4,000 jobs in the area.

The 2009 strategy priorities, in relation to Staffordshire impacts, noted that Leicestershire Promotions Destination Management Partnership gives a higher profile to the Forest than the other two, although *Destination Staffordshire* and Visit Peak District and Derbyshire identify the long-term potential of TNF.

The strategic objectives for tourism in TNF reflected the vision of the key strengths of TNF. The five key principles - sustainability, quality, accessibility, partnership and adaptability - are the essential principles underlying the Strategy. The five strategic objectives are:

1. To improve the quality of the Forest tourism product to fit the changing needs of potential visitors seeking a wide range of high quality and value for money experiences.
2. To develop and sustain the unique environmental resource of the emerging Forest – the Forest’s USP - and supporting infrastructure for the benefit of visitors and residents.
3. To improve tourism business performance in TNF, enabling future re-investment and new job opportunities.
4. To focus marketing initiatives on key target opportunities through effective destination, thematic and tactical campaigns, improved co-ordination and packaging of suppliers.
5. To ensure that all tourism stakeholders in and around TNF are working effectively together to realise the Vision, informed by good quality, up to date information.

Both sets of consultancies working on the Staffordshire Tourism Strategy and on The National Forest are currently liaising to ensure complementarity and collaboration wherever appropriate.

2.16 The impact of these strategies and funding frameworks

In developing Staffordshire’s forward approach to tourism, the above strategies clearly indicate that two core drivers are consistent across the county and sub-regional borders crossing over with the neighbouring LEPS and landscapes that incorporate Staffordshire. These are the motivational factors to work more effectively and collaboratively, creating increased business success and employment; and secondly a generally positive attitude towards improving **identities and connections** between sub-regional destinations and organisations, with the aim of **increasing visitor numbers, spend and activity**.

Staffordshire as a whole must build on these opportunities, to create **a strengthened product and experiences, a clearer and more visible identity and offer**, be better understood by the industry itself, by politicians and above all retain and attract existing and potential visitors.

APPENDIX 3. VISITOR ECONOMY PERFORMANCE

3.1 Performance Targets within Staffordshire County Council Tourism Strategy, 2012-2014

The importance of the tourism sector is acknowledged by its contribution to the County Council's corporate strategic priority outcomes across a number of key themes. A series of performance targets were set in the Staffordshire County Council Tourism Strategy, 2012-2014; this document was prepared separately in house by the council following the DMP's 2011-2014 Strategy and Action Plan and this may have affected the nature and ambition of the targets.

A number of Key Performance Indicators (KPIs) were set for *Destination Staffordshire*, monitored quarterly and annually by the DMP. In terms of measuring progress over four years against these KPIs set in 2011, it should be noted that there are only limited KPIs available for 2014, as different means of assessment have a time-lag built in, and not all are yet available in early 2015. Also, not all the original indicators are still assessed by third parties, or even if assessed are not able to use the same methodology, which means that *Destination Staffordshire* is unable to draw like-for-like comparisons against some 2011/12 data. However, the table below shows **good performance** in the key areas of growth in leisure tourism value and employment. The 2011 **Tier 2 Objectives** of Staffordshire County Council in delivering a strong growth strategy for the visitor economy and its performance to date are:

Target Objective Forecast in 2011	Actual performance by 2014
Continued growth in the Staffordshire leisure tourism economy from £1,037 million (estimated) in 2011 to £1,197 million in 2014	Economic impact once measured for 2011 was less, at £1,001 million, a lower baseline to progress from. Growth to 2013 (most recent measure) of £1,139 million, performing well towards target
This leisure tourism economy forecast of <u>15.5%</u> increase in £m value and matching that of VisitEngland – noting that VE enjoyed significant extra RGF funding and resources to promote tourism	Actual out-turn increase to date, over 2 years not 3 years, of 2013 vs 2011 already shows a healthy 13.8% growth, performing well towards target – some reflection of increased ERDF funding support for the sector
Increased employment levels in the leisure tourism economy from the 21,054 direct jobs in 2011 (estimated), to 23,245 in 2014, up by 10%	The 2011 estimate of employment was notably over-optimistic – the actual jobs subsequently modelled were 18,435, a fall on 2010. However, 2013 actual figure of 20,153 shows an increase , albeit not at the scale originally forecast
Increased share of England's overall visitor economy from 1.63% to 1.68%	Change in methodology means cannot directly compare to national calculation
Continued growth in the Staffordshire business tourism economy from estimated £646 million in 2011 to £729 million in 2014; 13% increase	Updated business tourism economy model not been undertaken by third parties, unable to make like-for-like comparison. A specific conference and meetings assessment was carried out instead
Increased employment levels in the business tourism economy from the current 12,582 direct jobs in 2010 (estimated), to 13,588 in 2014, up by 8%	Updated business tourism economy model not been undertaken by third parties, unable to make like-for-like comparison

3.2 Factors influencing county, regional and national tourism performance data

Estimating the economic impact of tourism, both in terms of making forward forecasts, and then generating impact modelling the following year, is an activity that is heavily dependent upon ‘top down’ national research, and influenced by national and local factors such as weather, economic climate, major events, etc. In the midst of the previous 2011-14 strategy timespan, at the end of what we now know was a deep national and international recession, **the year 2012** was a significantly unusual year for tourism.

- 2012 saw an additional, albeit wet, Bank Holiday in June to celebrate the Queen’s Diamond Jubilee
- Then July/ August/ September saw the London Olympics and Paralympics take place – all with a major influence on London affecting domestic and overseas travel
- This behaviour affected the tourism impact on the regions, and makes it difficult to compare results for 2012 against 2011, and for 2013 against 2012
- We do however know that London alone now counts for around 25% of all spend in the UK visitor economy

For 2013, over the year as a whole:

- The **number of trips** taken in **England fell back** by 3% compared to 2012, with a 4% drop in bednights, and a 4% fall in the amount spent
- However, rather positively, the **West Midlands region** experienced a 6.2% **increase in overnight** trips during 2013. Bednights were flat on 2012 **although expenditure was up** by 6.8%.
- This resulted in a **decrease** in the average length of trips within the **region** (the number of nights per trip) from 2.44 nights per trip in 2012 down to 2.29 in 2013
- For the region, **the average spend per night was up** from £59.55 in 2012 to £63.64 per night in 2013.

During 2012, an increased level of optimism about the economy (however temporary) and personal finances and the relatively poor, wet 2012 weather led people wanting to return to a holiday abroad, affecting holiday taking in the UK in 2013. Overseas residents made an increased number of overnight visits to London in 2012 compared to 2011, but a reduced number of overnight visits to the rest of England.

Many other factors of a social and technical nature have continued to affect tourism in general; most notably the rapid ongoing rise in the use of mobile technology and yet more social media applications, “apps” for more and more services (both consumer and back office functions), growth in the strength of major brands and associated online purchasing. These are all affecting the visitor economy as well as the rise in the actual number of ambient technology users.

Uncertainty in employment circumstances, low interest rates affecting the value of savings, pensions and the “grey pound” and continuing changes in family groupings, producing ‘vertical’ multi-

generational as well as 'horizontal' second families all creating demand for flexibility and intensive levels of customer requirements.

To provide a more comprehensive context for the most up to date 2013 results for Staffordshire, longer term trend data needs to be reviewed. Over the last five years, the volume of **domestic trips taken in England increased by +7.5%** between 2008 and 2013. However, more recently there was a **slight decline (-3%)** in England trips since 2011, which was a record year for domestic overnight tourism trip volumes.

As with trip volumes, nights and spend have seen increases since 2008 (+2% and +15% respectively).

3.3 Tier 2 and Tier 3 Staffordshire performance targets

The following table shows how different Tier 2 and Tier 3 targets within the Staffordshire County Council Tourism Strategy, 2012-2014 have performed to date, and how on or off target they are. A **number have performed well** against the Staffordshire County Council KPI targets, whereas some others are **not yet meeting** the targets: this may be to an extent a reflection of over-ambitious figures set in some cases that may not have fully taken into account the impact of the ongoing tightened national economic situation over these years and changing employment patterns.

	Actual	Fore- cast	Actual Outturn on target	KPI Target	Actual Outturn on target	KPI Target	Actual Outturn on target	KPI Target	Act- ual #	SCC Target Increase against forecast 2014 vs 2011	Actual Outturn Increase to date, 2 years not 3 of 2013 vs 2011	Comment against 2011-14		
	2009/ 10	2011	2011	2012	2012	2013	2013	2014	Not calcul ated	£mn	%	£mn	%	
Tier 2 Objectives														
1. Staffordshire leisure tourism economy growth (£ million)	985.5	1,036.8	1,001.0 ▼	1,090.3	1,147.0 ▲	1,146.0	1,139.2 ▼	1,197.0		160.2	15.5%	138.2	13.8%	Performing well towards target ▲
2. Staffordshire business tourism economy growth (£ million)	618.0	646.0	No updated review	674.0	No updated review	701.0	No updated review	729.0		83	12.8%	n/a	n/a	No updated review
3. Employment levels (actual direct) in the leisure tourism economy	19,124	21,054	18,435	21,184	19,942	22,215	20,153	23,245		2,191	10.4%	1,718	9.3%	Performing well towards target ▲
4. Employment levels (actual direct) in the business tourism economy	12,041	12,582	No updated review	13,123	No updated review	13,664	No updated review	13,588		1,006	8.0%	n/a	n/a	No updated review
Tier 3 Objectives														
1. Increase in total visitor trips (million)	20.134	20.564	20.834 ▲	20.995	24.760 ▲	21.425	23.886 ▲	21.727		1.162	5.7%	3.052	14.6%	Greatly exceed target ▲▲
2. Increase in staying visits (million)	1.308	1.335	1.400 ▲	1.363	1.404 ▲	1.391	1.586 ▲	1.419		0.083	6.2%	0.186	13.3%	Greatly exceed target ▲▲
3. Increase in day visits (million)	18.826	19.228	19.518 ▲	19.631	23.360 ▲	20.034	22.300 ▲	20.308		1.079	5.6%	2.782	14.2%	Greatly exceed target ▲▲
4. Increase in average spend per visitor	£48.95	£50.42	£48.05 ▼	£51.93	46.32 ▼	£53.49	£47.69 ▼	£55.09		£4.68	9.3%	-£0.36	-0.7%	Notably below target ▼▼

Source: Destination Staffordshire analysis 2014

Actual 2014 outturn not yet commissioned/ available/ calculated by appropriate third party organisations.

▼ ▲ = Actual outturn up or down on annual target

An alternative way of viewing the figures and performance against the KPIs and which ones are on, or off or exceeding - target shows:

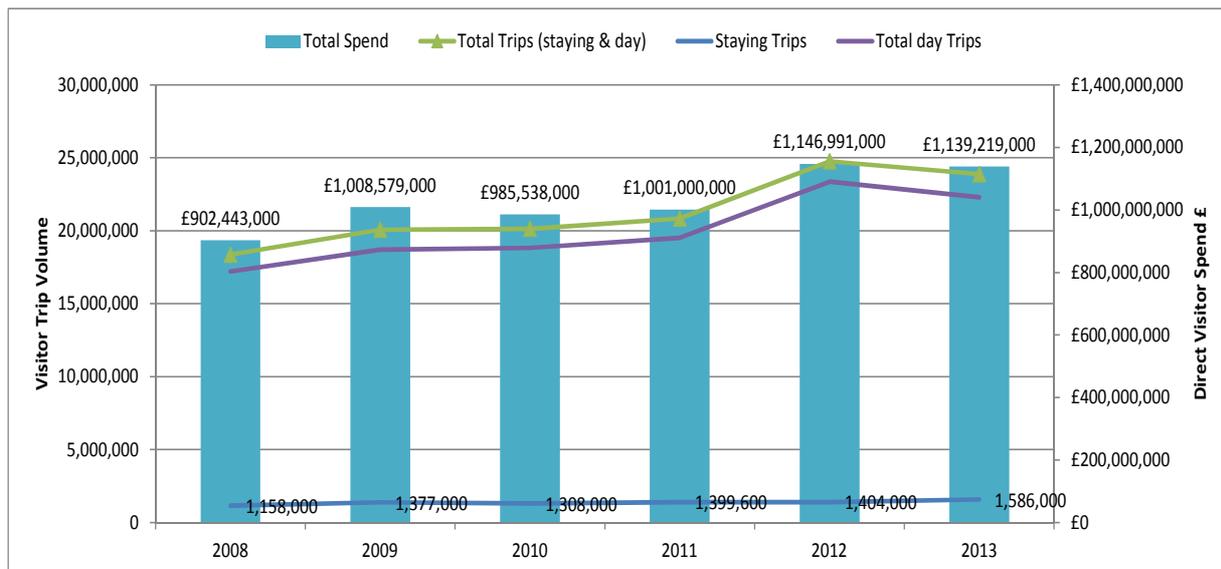
Staffordshire Leisure Visitor Economy	2013	2008	% 2013 vs. 2008	SCC 2014 Strategy Target	Required increase 2014 - 2013	Annual % growth req'd
					(-) means 2014 target already achieved	
					Target not yet reached	
Total Trips (staying & day)	23,886,000	18,359,000	30.1%	21,727,171	-2,158,829	-4.52%
Staying Trips	1,586,000	1,158,000	37.0%	1,419,171	-166,829	-5.26%
UK trips	1,418,000	960,000	47.7%	1,240,214	-177,786	-6.27%
Overseas Trips	168,000	198,000	-15.2%	178,957	10,957	3.26%
Commercial trips	880,000	637,000	38.2%	573,989	-306,011	-17.39%
VFR	706,000	521,000	35.5%	845,181	139,181	9.86%
Total Nights	4,214,000	4,471,000	-5.75%	5,120,083	906,083	10.75%
UK Nights	3,050,000	3,660,000	-16.7%	3,447,992	397,992	6.52%
Overseas Nights	1,164,000	811,000	43.5%	1,672,091	508,091	21.83%
Total Staying Spend (million)	£233.53	£190.89	22.3%	£220.30	-£13.23	-2.83%
UK Spend (million)	£174.75	£114.89	52.1%	£169.30	-£5.45	-1.56%
Overseas Spend (million)	£58.79	£76.00	-22.6%	£51.00	-£7.79	-6.62%
Total day Trips	22,300,000	17,201,000	29.6%	20,308,000	-1,992,000	-4.47%
Total day trip Spend (million)	£905.69	£711.55	27.3%	£976.70	£71.02	3.92%
Total Spend (million)	£1,139.22	£902.44	26.2%	£1,197.00	£57.78	2.54%
Employment	28,330	23,353	21.3%	31,702	3,372	5.95%
Direct	20,153	17,145	17.5%	23,245	3,092	7.67%
Indirect/ Induced	8,177	6,208	31.7%	8,457	280	1.71%

Staffordshire

Source: Destination Staffordshire analysis, 2014

Turning now to specific details within Staffordshire’s overall performance from 2008 to 2013, Staffordshire County Council’s own Tourism Strategy targets for 2014 shows the county’s comparisons with the West Midlands and England are **performing particularly well**. The percentage **growth** 2013 against 2008 for the West Midlands All Staying Trips is **+14.5%**, whilst **Staffordshire outperformed this at +37.0%**, and England only saw +6.8% growth.

Shown as a graphic, **the general upward trend in trips, days and spend** is more clearly seen in the table below. Albeit with the slight dip in 2013 in both numbers and spend.



Source: Destination Staffordshire

3.4 Staffordshire Tourism Economic Impact Assessment 2013²

With its EDRF funding, *Destination Staffordshire* has been able to maintain the important annual modelling of tourism estimates to the county. The key results of the Staffordshire Economic Impact Assessment for 2013 (which incorporates Stoke-on-Trent) are:

- 23.9 million trips were undertaken in Staffordshire; as 22.3 million day trips, and approximately 1.6 million overnight visits.
- The overnight trips account for a total of 4.2 million nights in the area.
- During their visit to Staffordshire, tourists spent approximately £1,139 million. On average, about £95 million is spent in the local economy each month.
- Overnight visits generated approximately £234 million in the area, compared with £906 million from irregular day trips.
- The 23.9 million trips in Staffordshire account for an approximate spend of £1,139 million on tourism in the area supporting in the region of 28,331 jobs, both for local residents and for

² The Research Solution, 2014

those living nearby. Approximately 20,153 direct tourism related jobs are supported with an additional 8,177 non-tourism jobs dependent upon multiplier spend from tourism.

These figures are those used in the KPI monitoring in section 3.3 above.

To provide some element of scale of **comparison**, albeit for a slightly different year of modelling, the key volume and value results for Shropshire County and for Telford & Wrekin derive from the two separate unitary areas of Shropshire and Telford & Wrekin Tourism Economic Impact Assessments for 2011:

For Shropshire:

- 11.6 million trips were undertaken in Shropshire
- 10.4 million day trips, and approximately 1.2 million overnight visits
- The overnight trips account for a total of 3.8 million nights in the area
- Tourists spent approximately £501 million in total
- Overnight visits generated approximately £180 million in the area, compared with £321 million from irregular day trips.
- The 11.6 million trips that occur in Shropshire account for an approximate spend of £501 million on tourism in the area supporting in the region of 14,767 jobs
- On average, about £42 million is spent in the local economy each month.

For Telford and Wrekin:

- 3.6 million trips were undertaken in Telford & Wrekin of which there were..
- 3.3 million day trips generating £105 million
- Approximately 0.3 million staying trips accounting for a total of 1.2 million nights in the area and generating approximately £55 million
- The 3.6 million trips that occur in Telford & Wrekin account for an approximate spend of £159 million on tourism in the area supporting in the region of 5,617 jobs, both for local residents for those living nearby
- Approximately 4,448 direct tourism related jobs are supported with an additional 1,169 non-tourism jobs dependent upon multiplier spend from tourism representing 7% of employment
- When averaged out, and including the wider supply chain over £13 million are spent in the local economy each month.

This £159m, whilst covering people who are travelling for regular business reasons/meetings, however, does not include the value which accrues to Telford and Wrekin from specific Business Tourism i.e. convention business, largely driven by the Telford International Centre and the hotels in the vicinity. When this is included the total value of both leisure and business tourism is £259m.

Whilst not comparing like for like destinations, the variation between Shropshire and Staffordshire, albeit with data estimated for two different years (2011 and 2013) **shows how well Staffordshire is performing**. When combined, the average monthly value of tourism income across the geographic

county of Shropshire (including Telford & Wrekin) is £55million, compared to Staffordshire’s £92million per month. Taking into account factors such as Staffordshire’s larger population, including the city of Stoke-on-Trent, of c1, 098,000 compared to c475, 000 in Shropshire and Telford & Wrekin, shows that the population size has a role in driving some of the greater value of tourism. Staffordshire sees notably **higher total trips** (24 million) than Shropshire and Telford & Wrekin’s 15 million.

One element where **Staffordshire does not perform quite as well** is with the total volume of **nights** spent in the county – **4.2 million nights, compared to 5 million** for Shropshire and Telford & Wrekin. However, and recognising the same years are not being compared, £235 million spend is generated by these overnight visitors to Shropshire and Telford & Wrekin, which is the same as the Staffordshire £234 million spent in the county by some 800,000 less total nights. In other words **overnight spend per head per night in Staffordshire is notably higher.**

Day visitors to Staffordshire, for a wide variety of reasons not least the major theme parks, number some **22.3 million**, around **two thirds more** than the 13.7 million to Shropshire and Telford & Wrekin. Various local attractions, geographical destinations, transport communications to adjacent large centres of population etc influence this.

This all contributes to Staffordshire’s substantial **£1,139 million** spend from tourism, **almost double** the £660 million to Shropshire and Telford & Wrekin.

However, when using a **per resident head ratio of the economic impact of tourism**, Staffordshire (including Stoke-on-Trent) sees c.£1,037 value of tourism income per resident compared to a higher £1,393 value of tourism income per resident for Shropshire and Telford & Wrekin. This indicates that more could be achieved in this county bringing greater benefit and employment returns.

Value of tourism income per resident

Selected County /Area	Total Tourism Economic Impact	Population*	Value of tourism generated per resident
Staffordshire plus Stoke-on-Trent	£1,139,000,000	1,098,300	c.£1,037
Shropshire plus Telford & Wrekin	£660,000,000	473,900	c.£1,393

* ONS 2011 Source: *Destination Staffordshire* research, 2014

3.5 Staffordshire Stoke-on-Trent Conference Bureau Annual Report 2013

The role of the Staffordshire Stoke-on-Trent Conference Bureau is:

- To raise the profile of the county as a conference destination
- To increase the volume and value of business tourism into the area

The document reports on the 2013/2014 membership period, promoting Staffordshire as ‘The Perfect Location’ throughout all marketing activities and press coverage, playing on the county’s excellent location in the UK.

The research ‘Staffordshire and Stoke-on-Trent conference market research report’ was completed in April 2013 by *The Right Solution*. Key findings are specifically for the value of conferences and meetings related to 50 venues across the county, not for the entire business tourism sector:

- The market value of conferences and meetings in Staffordshire and Stoke-on-Trent is £63,740,089. This does not include overnight accommodation which is accounted for separately in the economic impact estimate
- The economic impact of estimate of the conference business in Staffordshire and Stoke-on-Trent is £316,287,033, which is 1.94% of the UK total
- The conference and meetings industry in Staffordshire supports 10,500 jobs.

3.6 Analysis of Volume of Accommodation Stock in Staffordshire

Using *VisitEngland* accommodation stock information, Staffordshire and Stoke-on-Trent do not contain a great deal of total accommodation establishments – just 472 in the county and 26 in the city. In reality there will be more establishments, generally small in size, that are unknown to the *VisitEngland* database in all areas of the country. By comparison Shropshire (including Telford and Wrekin) and Derbyshire have **far more accommodation** businesses and bedspaces available despite **lower populations**.

The number of bedspaces and establishments is heavily influenced by how urban or rural a location is, as accommodation is not only for leisure use, but also supports visitors coming to stay with friends and family/weddings, for business, conferences, university visiting, etc. Hence larger population centres see greater volumes of accommodation linked to the scale of population and economic activity. The lack of range of larger accommodation establishments was seen as a major weakness across Staffordshire by many consultees during the 2015 strategy review.

When reviewed in relation to the resident population of the county, Staffordshire ranks around the **regional average** of accommodation establishments per 1,000 head of local population (at 0.5), but far below England’s value of 1.3 or Derbyshire’s 2.0.

Accommodation Stock in English Counties by type 2012 (VisitEngland)

Selected County /Area	Total Establishments	Population*	Establishments per 1,000 head of area population
Stoke-on-Trent & Staffordshire	498	1,098,300	0.5
Derbyshire	2,077	1,019,500	2.0
West Midlands region (old RDA)	3,279	5,608,600	0.6
Shropshire & Telford & Wrekin	650	473,900	1.4
ENGLAND	67,585	53,010,000	1.3

* ONS 2011 Source: *Destination Staffordshire* research, 2014

Similarly, looking at bedspaces provided, Staffordshire and Stoke-on-Trent (based on the *VisitEngland* database) have just c.16, 500 bedspaces, contrasted with 39,000 in Derbyshire, 23,000

in Shropshire & Telford. The number of bedspaces per establishment is **only 32.6 in Staffordshire, below** the West Midlands value of 42.7.

Bedspace Stock in English Counties by Accommodation type 2012 (VisitEngland)

Selected County/Area	Total Bedspaces	Bedspaces per Establishment	Population*	Bedspaces per 1,000 head of area population
Staffordshire	15,398	32.6	849,600	15.1
Stoke on Trent	1,143	44.0	248,700	
Derbyshire	38,959	18.8	1,019,500	38.2
Shropshire & Telford & Wrekin	22,940	35.3	473,900	48.4
West Midlands region	139,971	42.7	5,608,600	25.0
ENGLAND	2,852,057		53,010,000	53.8

* ONS 2011

Source: *Destination Staffordshire*, 2014

Thus the West Midlands average is influenced by the scale of greater Birmingham population, business and transport connections, with more large business hotels. Whereas Derbyshire, Shropshire and Staffordshire, as predominantly rural counties each with one or two urban cities/towns, have large numbers of small Bed and Breakfast establishments with relatively few rooms and beds per business.

These lower volumes clearly reveal an opportunity, noted in the previous strategy and fresh consultations, to grow the volume of bedstock in Staffordshire, generating more visits, spend and general benefit to the whole local economy, including jobs.

3.7 Staffordshire Visitor Satisfaction and Growth Potential Results and Insight from the VisitEngland annual TRI*M survey, June 2013-May 2014, TNS July 2014

VisitEngland operates a marketing and perception based survey of visitors and potential visitors to various destinations across the country, carried out by the agency TNS. This survey is fairly expensive to join and many destinations taking part are mature and well resourced. Staffordshire is a relative newcomer to the survey, which tends to be dominated by those which are mature destinations such as the Cotswolds, Lake District, etc., or those that have received Regional Growth Fund support from VisitEngland in recent rounds. The results for Staffordshire therefore need to be set within this context: that the county now buys into the survey to have its destination added into the consumer testing and analysis is in itself a significant step forward and should now provide an important baseline.

Satisfaction with destinations is analysed using the TRS “TRI*M model” which **measures the visitor experience** across a wide range of key indicators. These look at how individual visitor factors are rated in terms of Overall Performance / Likelihood to Recommend / Likelihood to Revisit / Competitive Advantage. The TNS model creates a Total England TRI*M Index of 94.

The current visitors to Staffordshire were researched and contrasted with the English average. The visitor profile of Staffordshire is closely aligned with English visitors in general; Staffordshire is most likely to attract *Empty Nesters* and *Families*, and appeals slightly more to those in socio-economic group AB.

However, by contrast, satisfaction among visitors to Staffordshire appears considerably **lower** than the national average –with a TRI*M Index of 74. In particular, ‘likelihood to recommend and revisit’ as well as competitive advantage against other destinations saw low ratings. This index rating of 74 is similar to Birmingham and Essex; in contrast higher ratings were given with an index of 92 for Derbyshire, 100 for Cotswolds, and 111 for the Lake District i.e long established rural destinations, with a longitudinal track record to self-assess in order to improve.

Staffordshire is, therefore, now in a good position to use this tracking perception survey to motivate the industry, make improvements and thus it is a valuable tool to inform the Tourism Strategy for 2015-18. Within the consultations, the SEAL PR and marketing consultancy agency highlighted that the **feedback by journalists** themselves (as contrasted with visitors and potential visitors) reported very **positive responses** to Staffordshire when they actually ventured north of the M25 and **visited**. So there is clearly considerable scope to improve upon this level of awareness and perception as well as post-visit willingness to ‘recommend and re-visit’.

Within the TRI*M ratings, Staffordshire achieves no ‘High level’ strengths, but also has no ‘High level’ weaknesses rated. Having ‘lots of things to see and do’ and ‘offering a range of choice of different breaks’ were identified as **key strengths** for Staffordshire, (although please note this does not mean that this is the best way to market the county).

The Medium level strengths are:

- A31. Unspoilt countryside
- A05. Clean and tidy environment
- A17. Accommodation that offers value for money
- A02. Welcoming and friendly people
- A01. Good value for money generally
- A30. Interesting towns and villages to visit
- A04. A place where I feel safe and secure
- A08. Easy to find useful information about the destination when planning the trip
- A16. Good quality accommodation
- A26. Opportunities to see famous buildings and monuments
- A09. Easy to book your trip/different parts of your trip in advance

The few Medium level weaknesses are

- A07. Easily accessible for those with impairments (e.g. those with mobility, visual or hearing impairments)
- A29. Attractive/well maintained town/city centre

APPENDIX 4. FINDINGS FROM CONSULTATIONS

4.1 Headlines from stakeholder consultations

One to one consultations were held with a range of stakeholders involved in the visitor economy³. They were provided with the previous strategy, Vision, Aims, Objectives and Recommendation Priorities list. Major thematic topics of discussion were structured and the discussion then covered progress with the strategy, its validity today and how priorities have been met, or should be refined moving forward. Summarising the issues and opinions has shown, in general, many similarities of view, albeit naturally with some divergent observations. No stakeholders felt that *Destination Staffordshire* was delivering poorly overall and even the very few negative comments were meant constructively.

In terms of key thematic areas, the **summary observations** are:

4.2 Stakeholder consultation feedback – *Destination Staffordshire* DMP

8. Overall the feedback around how *Destination Staffordshire* has performed is very positive and supportive, particularly about the DMP leadership and team in general, all of whom are well regarded. Staffordshire is unusually well supported by its County Council when compared to many other DMPs across the country and almost all consultees acknowledged the importance of this political and financial support. Paradoxically of course, almost everyone consulted recognised how vulnerable *Destination Staffordshire* would be without this support and that therefore it was imperative that future funding was secured and that other income streams might henceforth be needed.
9. There are few negative comments about the **Board** and its **sub-groups** structure; the model is still felt to be good, although not everyone feels that all the sub-groups are successful; some operate and deliver better than others, notably the Marketing and Funding groups. Some consultees noted that the sub-groups may not be sufficiently empowered to be effective and should be given more capacity to deliver. At the moment they are more about functionality in practice and reporting and of varying quality and effectiveness. With greater delegated authority there may be greater buy in and commitment and attract greater membership.
10. There was also considerable unsolicited comment from the private sector about parochialism and lack of understanding amongst local politicians. Politics and politicians are felt to be a mixed blessing, some understand the sector and ‘get it’, whereas others can be less helpful which can be frustrating for both SMEs and the DMP and this was felt to be a barrier to growth: if this could be improved it was felt it would be to the benefit of all.
11. **Communication** internally, to members and partner organisations, is still felt to be somewhat weak, as indeed it was before in the preparation of the last strategy. There is some agreement that it has not always been clear about what the DMP offers its members beyond promotion and business support and there is a need to tighten up what is communicated, how regularly and to which members and partners.
12. **Engagement** with the membership as a whole (and with non-members) could thus still be improved and in such a way that it would draw in new members, the numbers of whom are still

³ List included at end of report

felt to be a concern and which is acknowledged by the DMP itself. In general consultees are aware there is a big agenda to deliver and understand the pressures on what is a small team.

4.3 Stakeholder consultation feedback – Destination Management Partnerships and LEPs

Across the country the economic landscape is changing, with LEPs asserting greater impact after a number of years bedding in.

For Staffordshire, the SSLEP does not yet appear to have much impact on the visitor economy, but is inconsistent geographically, with three LEPs deciding on input and directing future priorities over different or indeed overlapping geographic areas of Staffordshire. This is not felt to be helpful or sensible, albeit with consultees varying in their understanding of LEPs and their role.

Tourism has only a second tier ‘barometer’ sector status within the Staffordshire Stoke-on-Trent LEP. This is seen as ‘better than nothing’ but means that **it is not in** the ‘premier league’ as a **priority sector** and a key driver of the economy, despite the fact that the DMP is functioning well as an organisation, is held in high regard by external peers and the Staffordshire visitor economy is clearly growing as shown in the performance data. In particular there seems to be a missed opportunity by all three LEPs to capitalise on the positive work by *Destination Staffordshire* on the area’s external awareness and perception, which is commonly recognised as a problem for the area.

Overall, consultees feel that **relations with Stoke-on-Trent are much improved** as they are with **The National Forest**. However, it is felt that there is still a lack of real engagement by East Staffordshire Borough and to some extent Lichfield and still some conflicts and parochialism between local level districts and county overlaps. It may be that in the future LEP(s) and other funders may have to demonstrate leadership in pushing more strongly for joined-up activity across all the districts within the county.

Research is seen as vital by all - market and performance intelligence is a tool for advocacy, supporting funding bids, influencing policy, informing marketing – in short everything! The DMP needs to be seen as lead player, informed about varied topics, that can talk to anyone at any level. Consultees state that it is vital that Staffordshire County Council continues to support and underpin the DMP and its strategic roles.

Most consultees therefore sense a vulnerability to the DMP with regard to any future loss of public sector funding, as has been seen with tourism around the country as local authority budgets scale back and focus on statutory duties. This means that the constant need to prove the value of the visitor economy to politicians at all levels to retain their commitment must continue.

Looking ahead, all English DMPs are bound to be under increasing financial pressure – due not only to Local Authority funding cuts etc – but also to the private sector being ever more choosy when deciding where to invest. It is likely that nationally the DMP network will ‘morph’ over future years into more flexible organisations, fit for the situation it finds itself in. Staffordshire is now taking stock through this Review in order to develop a resilient and robust strategy for its future, as far as is possible. Indeed one major consultee felt that the over-riding priority for the DMP - which would be its most valuable legacy in the event of any future collapse in funding - was to equip industry businesses with the skills they need to achieve and maintain the levels and standards necessary to compete in a national market.

4.4 Stakeholder consultation feedback - Marketing

It is realistic to accept that 'Staffordshire' is not in the national premier league as a visitor destination – it is not the Lake District, Cotswolds or Peak District. However, it does have potentially as much, if not more actual 'product' in terms of attractions and things to do than many other well known destinations. But what does visiting 'Staffordshire' actually mean? What is it that Staffordshire is really selling to potential and actual visitors? Is it an experience, is it authenticity, is it fun? The visitor proposition was still felt to be somewhat unclear to most consultees, despite general support for the new "Sheer" branding and delivery.

An observation by some is that the 'attract and disperse model', based around making more assertive use of the nationally well known brands, particularly attractions, will not work unless *Destination Staffordshire* is braver in terms of their use of these major brands (such as Alton Towers, Drayton Manor Park, Wedgwood, Emma Bridgewater and the Peak District). This viewpoint considers that these should spearhead promotion, to overcome the ongoing issue of some lack of awareness/ recognition/ warmth towards 'Staffordshire' as a destination.

That there is a lack of conviction about such an approach is probably driven partly by membership concerns and/or political considerations and thus trying to please everyone. There is also some level of tension between smaller and larger attractions, and better and less well known localised destinations.

Business tourism is recognised as being of good economic value, with a focus around a small number of key, generally larger urban, locations. It still needs more work on marketing and this is related again to destination awareness and perception issues.

Image and perception of Staffordshire – the DMP is the only organisation actually addressing this - both directly and indirectly – the Local Authorities and LEPs are not felt to really be tackling this. These organisations do not appear to recognise overtly the relationship between inward investment and the DMP's work in profile-raising. This is also felt to be another reason why the Visitor Economy should be adequately acknowledged for what it can do to support ALL Staffordshire businesses.

Opinions about the effectiveness and impact of **the PR activity** delivered over the past three years revealed a **divided opinion** on the success it had. It has had some success with national coverage in the past year albeit on a reduced budget and this could perhaps have been exploited more effectively if both the Marketing and PR agencies had had a closer working relationship.

The new Marketing work, market segmentation and the "Stafford-sheer" campaign is generally (though not universally) well received overall. The **focus on digital** and reduction of print is **welcomed**. However, many comment that the imagery used in the marketing campaign is not considered sufficiently **reflective of the real offer on the ground** – it is not distinctive enough to Staffordshire and images used are too repetitive. However, the summer 2014 campaign appears to have started well with a good reach and return.

There is general consensus that **digital media** needs to be maintained and improved at all costs and needs to be excellent. Those that know about the secondment of a digital specialist to the DMP are pleased about it.

VisitEngland Futures research shows how much social changes impact tourism decisions and there is a growing need to cater for multi-generational family visits along with other emerging markets

whilst maintaining the targeted market segmentation now developed. This will be central to Staffordshire's success in the next few years.

4.5 Stakeholder consultation feedback – Product Development

Staffordshire is felt to be quite successful in its **range of investment and growth in tourism assets**. New products are coming at *The World of Wedgwood* in June 2015, the *Middleport Pottery* redevelopment and the new "high end" outlet retail development proposed near Cannock is welcomed. New accommodation is opening at the major theme parks and the Canal & River Trust is refreshing its strategy for the region and likely to be making a new tourism appointment. The National Memorial Arboretum's proposals for major new infrastructure to extend its interest and facilities will reach a broader and much larger audience. Better signposting will be needed in many instances.

Retail – consultees felt the DMP could make more of the identity of the **market towns** as independent shopping destinations, as there is no major retail town/city retail offer with high reputation to 'punch above their weight'.

There are some other new hotels and accommodation establishments coming on-stream across the county, but there is still a perceived problem with the **overall lack of accommodation** and the **low volume of establishments** and limited range of choice and level of quality available. This is borne out by the analysis of bedstock in the earlier Performance data of this paper, and the economic impact studies which demonstrate the **high visitor spend** across the **overnight sector** as a whole (not all of which is commercial paid hotel accommodation).

The theme park hotels all have excellent high occupancy levels but elsewhere the levels are average.

The strategy should have a **continuing focus on increasing bed nights**, with the positive economic effect that flows from this and the concomitant connections to other activities to enjoy and spend on such as the many **food and drink** opportunities. Many felt that better links are needed to create more awareness of this key aspect of any visit as a priority and some suggest a revisit of the decision on winding down the Taste of Staffordshire initiative might be timely.

The planned launch of packages linking accommodation and attractions by the DMP should have impact here.

4.6 Stakeholder consultation feedback – Membership and Income

Membership mainly relates to SMEs and their perceived value and opportunities that being part of the DMP brings them, when *Destination Staffordshire* is competing with other, particularly online alternatives for their business spending on marketing and business support. Growing the membership and diversifying the DMP's income stream was one of the actions identified in the previous action plan, but it is understandable in the light of the huge ERDF programme that this was an area that didn't receive as much attention as it needed. Thus the lack of growth in membership over the past four years needs addressing as soon as possible, as this also impacts on the perceived level of industry support, representation, advocacy and credibility that *Destination Staffordshire* stands for. One positive development has been the much closer working relationship with the

Staffordshire Chamber of Commerce which has been achieved and thus a successful action plan delivery from the previous strategy. **Business support/engagement** activities through ERDF funded programmes seem to have been very well received by almost everyone across the different schemes.

The low growth in members also has an impact upon income generation and sustainability of the organisation and potentially on EU and other funding opportunities.

If this could be improved it could mean that DMP would be less dependent on the same regular businesses and organisations for support and involvement.

4.7 Stakeholder consultation feedback – Other Issues or Topics

Consultees made scarcely any mention of “sustainability” within the actions of the DMP over the past few years.

The **loss** of the **STAGS** group and limited apparent impact of the Staffordshire Environmental Quality Mark (SEQM) launched in 2011 to ‘Make visitors fall in love with Staffordshire’ suggest that there has not been a great deal of support behind the scenes to promote these. The SEQM group has now become a Community Interest Company (CIC), but some consultees at the tourism workshop felt this topic was still an important aspect of the perception of Staffordshire.

The **Staffordshire Hoard** – there is general disappointment and frustration about the lack of information about how the **Hoard** was actually benefiting the county in terms of product and awareness. There is disquiet that a significant amount of money had been spent but where was the product and how could tourism businesses benefit and exploit it? This was seen as a major opportunity in 2011, but has neither achieved a real ongoing public profile nor any visible benefits to the visitor economy of Staffordshire.

VisitEngland will have a new strategy/framework later in 2015. This is likely to focus on product development and “experiences”. It is realistic in its approach, recognising that the English tourism product across the board may just **not be strong enough**, that not everywhere can compete on a global tourism stage where there is so much excellence. A key thread is likely to be the idea of ‘Great destinations’.... where you have ‘Great experiences’. All this is still subject to months of strategic development and consultation, so cannot yet be confirmed as the future way forward does and how it can help Staffordshire, so this may be an opportunity to improve this.

4.8 Consultation feedback from ERDF programme and other service suppliers

The business suppliers *Winning Moves*, *RH Associates*, *Seal PR and Tourism South East* and other sub-contractors delivered the range of ERDF-funded and other DMP programmes across marketing, PR, business skills and business support. Most suppliers were consulted about their views of the programmes they delivered, the relationship with the DMP and the businesses receiving support and buying into the activities. All confirmed they had familiarised themselves with key points from the previous strategy and used it in their approach to delivering the services.

Key feedback notes are:

Communications between suppliers

Everyone is upbeat about the programmes delivered; however, many felt it would have been beneficial for all the external delivery companies to have had at least one combined meeting together and with the DMP when they can share any queries/ successes/information/ challenges/ opportunities etc. This would ensure everyone pools their skills and resources for the benefit of a smoother delivery to as many SMEs as possible within the profile required. The suppliers themselves had a very good perception of the DMP as an organisation and recognised that it was a small ship trying to chart large waters and that ERDF processes can be very challenging.

Whilst there are no real conflicts of interest amongst the companies, some aspects have overlap which caused duplication and communication issues to businesses – mainly around PR and marketing. Improving this in the future would get even better value from the activities.

Business engagement in programmes

Engagement with and recruitment of businesses on some programmes was sometimes difficult—occasionally requiring some cajoling and persuasion. There were possibly too many activities going on at the same time too, making an extreme demand on SMEs with their low resources and available time.

The suppliers suggested that they may need to stagger such activity with SMEs in the future to make sure each service deliverer can achieve their required targets. Businesses are often so cost and/or time sensitive that suppliers had to go to some lengths to accommodate them, and this was for free, ERDF –funded services. This would indicate that they (SMEs) would be loathe to pay for such activity in the future.

To increase reach, there is a need to engage more with non-members and additionally convert them to become members of *Destination Staffordshire*.

Marketing of Staffordshire

Comments evident from the supplier viewpoint echoed some of the earlier consultation views about an apparent lack of consensus on what the Staffordshire **visitor proposition** really is and the drive to get this clearly articulated. The marketing and PR companies, by virtue of being ‘in the business,’ have a real awareness of the very low national awareness and perception of Staffordshire amongst consumers and non-visitors.

The launch of the *Destination Staffordshire* Tourism Awards in 2013 was welcomed. Getting more businesses also applying for national award schemes is good for the repositioning of the national perception of Staffordshire and creating a greater volume of businesses being celebrated in campaigns. Business support programmes managed to increase the numbers of applicants to the *VisitEngland* award scheme, thus working well towards this ambition.

Relationships of businesses with the DMP

The suppliers also have a role as intermediaries between themselves providing a service to businesses (SMEs) and the DMP, and picked up many observations from the businesses. Generally the suppliers heard that businesses had good relations with the DMP and felt it was doing a good job. Better communication was needed though in some cases, such as more face to face meetings where possible with members (and non-members) and also in making very clear the various schemes’ constraints and criteria for participation.

One question arose as to whether *Destination Staffordshire* may have spent more time liaising with the new marketing agency at the possible expense of PR and its role in spreading positive communications out to businesses and potential visitors.

Accommodation

Again, comment was made that across the county there is an inadequate quantity and variety as well as quality of accommodation. This supports the range of comments made by key stakeholder consultations, and also reflects the suppliers' experiences when working around the country with competitive destination knowledge to draw upon.

4.9 Destination Staffordshire Tourism Workshop 23 February Feedback

Members of the DMP and the Board were invited to attend a half day cross-sectoral workshop to consider how the 2011-14 strategy had progressed, what had worked well and what less so, and to contribute towards prioritising for the future. Around 30 participants, a mix of private sector businesses, organisational representatives, public sector officers and elected members attended. The workshop participants identified positives and negatives associated with the implementation of the last strategy.

4.10 What has worked best from the previous strategy and what has worked less well

Delegates indicated key aspects of the 2011-14 strategy they felt had been **successful**:

Positives from the last strategy 2011-14

- **Business support** – skills and marketing – successful through the ERDF funding
- **Business tourism** – promotions. Also including smaller businesses - £ figures value now available
- **Social media** – big improvements in range and impact
- **Research and Market intelligence** – a lot now available and it's very valuable for bidding for funds, political support etc
- **Marketing** – the '...sheer' suite of resources – they "look classy" – good direction, positive support

Negatives from the last strategy 2011-14

- **Business support** – not met all expectations eg hands on technical training/support needed – for SMEs – IT skills – needed due to various levels of ability and hands-on support
- **Data** – joining up and sharing the data was felt to be needed – e.g needs assessment – but outputs were not shared, so couldn't be acted upon by all. Not everyone knows how best to use data or market intelligence in their business operation
- Constraints within some funding projects and parameters of funding

-
- Lack of feedback from DMP to local groups and businesses eg post-meeting minutes – a need to improve communications
 - The visitor ‘app’ is not felt to work well or to have been amended/improved
 - Holiday parks and canal accommodation seem to be overlooked as sectors – also the potential of University markets of visitors and parents: they generate lots of repeat visits and have substantial value to the local economy
 - Lack of engagement with small businesses – why aren’t people joining? DMP needs to be more proactive – eg more use of facebook and other viral activities
 - Very few quality B&Bs in Stoke – some areas are still lacking certain types of accommodation and quality.

4.11 What has changed since 2011?

Looking back over the past four years, the group explored what new players and products have arrived, impacting upon tourism, both within the county and in national trends:

Positive changes

- User Generated Content on websites plus the whole explosion of social media
- Consumer expectations increased further
- De-regulation of ratings, more use of Tripadvisor, peer review than AA/ VisitBritain stars
- Trentham Estate growth
- National Memorial Arboretum and its visitor growth
- More national awareness of the county and its products
- Extended family markets – trans-generational visits are becoming more common
- Launch of SAVAS and the new packages and advertising opportunities on the DS website

New opportunities

- Iron Man and similar major triathlons
- Tour of Britain cycle presence in county
- Waterways – new role of Canals and River Trust (CRT, former British Waterways)
- Growth of NMA facilities and image

Negatives

- Visitors are now more demanding – specific requests, want discounts – they want even more
- Money is still tight and expenditure levels low, many are specifically looking for ‘free’ activities
- Visitors now have wider experience to judge against
- Online Review sites – how can businesses effectively deal with negative feedback

- Reduced value placed on AA and VisitBritain star ratings for accommodation
- People want 'free' activities eg on Cannock Chase, but there isn't enough support to pay for the site management
- We should make more of water – canals, reservoirs etc – connect them up more – opportunity for CRT to help here, need for a better map of waterways?
- Recent ruling on state aid for public sector funded websites not being able to take bookings
- International visitors – how to provide information in foreign languages for small volumes of non-English speaking visitors – opportunities with big companies and universities.