

North Shropshire & Oswestry DDP Marketing Strategy

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EXECUTIVE SUMMARY

Shropshire Tourism has been commissioned by Shropshire Council to develop a marketing strategy and action plan for North Shropshire & Oswestry Destination Development Partnership.

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

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

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

MAIN VISITOR MARKETS

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

	Day Visitors	UK Domestic Staying Visitors
Main Geographic location	1. 30min drive time 2. within Shropshire 3. 1 hour drive time	1. North West 2. West Midlands 3. London & South East
Main Age Group	45 plus	45 plus
Main Type of Group	Couples travelling without children	Couples travelling without children
Main Socio-Economic Group	C1C2	ABC1
Main Activity	1. General sightseeing 2. Shopping	1. General sightseeing 2. Other** 3. Canal trips
Suggested Motivations from Business Survey	1. Rest & Relaxation 2. Other* 3. Visiting the Countryside	1. Rest & Relaxation 2. Visiting the Countryside

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

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

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

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

NORTH SHROPSHIRE & OSWESTRY PRIMARY DRIVERS

The report identifies the following primary product offers to visitors, with supporting drivers:-

Primary Driver	Supported By:
Traditional market towns Oswestry, Ellesmere, Wem, Whitchurch, Market Drayton	Villages in and around North Shropshire and Oswestry Canals Landscapes & rural countryside offer Outdoor Activities History & Heritage
Canals	Market towns Landscapes & Countryside Outdoor activities History & Heritage
Landscapes & Countryside	Outdoor activities, e.g. walking, cycling, riding, golf, etc Wildlife Market towns and villages Canals History & Heritage Food & drink, local produce & farm shops
Diverse Attractions	Market towns Canals Gardens Farm Attractions Castles Landscape & Countryside

	Caravan sites (destination attraction in their own right) Hawkstone Historic Park and Follies History & Heritage
History & Heritage	Physical product on the ground, e.g. castles & forts Myths & Legends, e.g. King Arthur

North Shropshire and Oswestry’s proximity to larger urban areas and main road networks, e.g. the M6, Chester and Cheshire, North Wales & Staffordshire also make it an attractive proposition, particularly to day visitors falling within the radius of 1-1.5 hour drive time. Location should therefore also be considered a key driver, underpinning the physical product on the ground (i.e. what’s actually there).

MARKETING STRATEGY

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

North Shropshire & Oswestry DDP is recommended to focus their marketing efforts specifically on:

Day visitors – who match the ‘*Sightseeing and Potterers*’, ‘*Discoverers*’ and/or ‘*Traditional*’ psychographic profiles, specifically from the socio demographic groups ABC1 aged 45 plus, travelling as couples without children from a maximum two hour drive time from the area. However, please note that the visitor surveys for North & Oswestry show that the majority of day visitors are relatively local and come from within only half an hours drive time (31%) or from within the county itself (30%), with 14% travelling for an hour’s drive time.

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

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

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

ii). Presenting the drivers, products and themes as a compelling visitor ‘offer’ (experience) to these target markets, using a distinctive style and tone in all communications

iii). Providing potential visitors with easy and clear routes to find further information about North Shropshire and Oswestry and ultimately ‘purchase’ the product

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

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

Additional perception and motivational research has been commissioned by Shropshire Council on behalf of the Marches Local Enterprise Partnership, and conducted by Arkenford. The results of this latest research will be incorporated into the overarching document that ties together the standalone but complementary strategies for North Shropshire & Oswestry, Shrewsbury and the Shropshire Hills & Ludlow.

It is also recommended that this research should be fed into the development of the marketing messages and creative content. As a core part of the marketing plan, it is recommended that a marketing working group is formed by North Shropshire and Oswestry DDP in order to develop the marketing proposition further with an intention to create a clear brief to invite destination marketing and brand development companies to submit proposals to take the areas brand and messaging forward and deliver the creative element across all of North Shropshire and Oswestry's marketing communications.

SECTION 1: DATA ANALYSIS

As part of developing this marketing strategy and action plan for North Shropshire & Oswestry Destination Development Partnership, Shropshire Tourism has conducted a

detailed analysis of existing visitor survey data to collate visitor information with a view to identify the top priority market segments within the day visitor, UK domestic staying visitor and overseas visitor markets.

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

North Shropshire District Visitor Survey 2007

The Research Solution was commissioned by Shropshire Tourism Research Unit in 2007 to undertake a major market research appraisal of the visitor profile and views of those visiting the North Shropshire District. Interviewing was carried out at many visitor destinations across the whole of North Shropshire. Sites included: Whitchurch Town Centre, Market Drayton Canal, Ellesmere Town Centre and Hodnet Hall Gardens.

The North Shropshire District Visitor Survey was carried out over the course of approximately 27 days from May to October 2007. A total of 480 parties of visitors were surveyed. Almost all (464) provided demographic data on their group. The average (mean) number of people per group was approximately 2.8 giving a total of at least 1,299 people included in the survey sample.

The survey “indicates that visiting an attraction and general sightseeing were the primary motives for respondents to visit North Shropshire. However, please note that the majority of interviews were undertaken at tourist attractions and town centres. Therefore, some bias may exist within results.”

Oswestry Borough District Survey 2007

The Research Solution was also commissioned by Shropshire Tourism Research Unit in 2007 to undertake a major market research appraisal of the visitor profile and views of those visiting the Oswestry Borough. Interviewing was carried out at many visitor destinations across the whole of Oswestry. Sites included: Oswestry Town Centre, Chirk Castle, Whittington Castle, Moreton Garden Centre and Mile End TIC.

The Oswestry Borough Visitor Survey was carried out over the course of approximately 28 days from May to September 2007. A total of 410 parties of visitors were surveyed. Almost all (406) provided demographic data on their group. The average (mean) number of people per group was approximately 2.8 giving a total of at least 1,137 people included in the survey sample.

Whitchurch Destination Benchmarking Survey 2007

The Whitchurch Destination Benchmarking Survey was carried out between May and September 2007 covering some 17 days, with interviewing taking place both at weekends and weekdays. A total of 204 interviews with visitors to Whitchurch were carried out during the survey period.

Interviewing was undertaken at five locations within the town in order to gain a cross section of visitors to Whitchurch: The Bull Ring, Whitchurch Memorial Gardens, Heritage Centre / VIC, High Street / Civic Hall, White Lion Car Park.

Oswestry Destination Benchmarking Survey 2007

The Oswestry Destination Benchmarking Survey was carried out between June and October 2007 covering some 17 days, with interviewing taking place both at weekends and weekdays. A total of 215 interviews with visitors to Oswestry were carried out during the survey period.

Interviewing was undertaken at six locations within the town in order to gain a cross section of visitors to Oswestry: Bailey Head (Bailey Street); Town Square; Cambrian Visitor Centre; English Walls Car Park; Heritage Centre and Oswald Road.

Wem Destination Benchmarking Survey 2007

The Wem Destination Benchmarking Survey was carried out between May and October 2007 covering some 17 days, with interviewing taking place both at weekends and weekdays. A total of 202 interviews with visitors to Wem were carried out during the survey period.

Interviewing was undertaken at four locations within the town in order to gain a cross section of visitors to Wem: Wem Town Hall; Mythstories Museum of Myth & Fable; Wem Library & Learning Centre and West Midlands Co-op Morris Central Shopping Park.

Market Drayton Benchmarking Survey 2007

The Market Drayton Destination Benchmarking Survey was carried out between May and September 2007 covering some 17 days, with interviewing taking place both at weekends and weekdays. A total of 213 interviews with visitors to Market Drayton were carried out during the survey period. Interviewing was undertaken at five locations within the town in order to gain a cross section of visitors to Market Drayton: High Street / Town Square, Library Square, Frogmore House, Morrison's Supermarket and Towers Lawn Crossroads.

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

Collated Visitor Surveys

Drawing all the visitor survey data together gave a total survey sample of approx. 4,409 visitors. This is broken down as follows:

- Day visitors: 3,323 (75%)
- Staying Visitors: 935 (21%)
- Overseas visitors: 146 (3%)

The Tourism Business Survey, 2011

Shropshire Tourism sent a business survey out to 253 businesses in October 2011 drawn from the main tourism sector (accommodation providers, attractions and event operators) and selected retail and catering businesses.

The purpose of this smaller industry survey was to see if the business operators' own experience of their own visitor markets corroborated the main visitor survey findings

and to help identify any significant differences between the two sets of data. By comparing the two sources of data alongside each other we are able to see if the findings of the collated visitor surveys are borne out by the opinions of the business respondents.

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

Of the 253 businesses and organisations included in the survey only 19 responded giving a response rate of just 7.5%. Additionally, many did not complete all the relevant parts of the survey. As a result of the low response rate we would caution against using this particular data for anything other than comparative interest alongside the visitor survey data.

The 19 respondent businesses/organisations were made up as follows:

- Accommodation: 13 (Hotel: 1, Self-catering: 5, B&B: 5, Caravan/camping: 2)
- Attractions: 1 (Activity providers: 1)
- Other: 2 (See below)
- Retail: 2 (Food retailers: 2)

1 business did not specify their type of business.

Other organisations included:

- Tourist Information Centre (1)
- Customer Service Point and Visitor Information Centre (1)

Day Visitor Analysis

	Day Visitor Surveys	Business Survey
	Total sample size: 3,323	Total sample size: 19
		Respondents: 15
Geographic Location	1. 30min drive time: 31% 2. within Shropshire: 30 % 3. 1 hour drive time: 14% 4. Longer: 6% 5. 1.5 hr drive time: 3% 6. 2 hour drive time: 2%	1. within Shropshire: 60% 2. 1 hour drive time: 27% 3. 2 hour drive time: 7% 4. Longer: 7% 30min drive time: 0% and 1.5 hr drive time 0%
		Respondents: 14
Age Profile	1. 65+ years: 21% 2. 55-64 years: 19% 3. 45-54 years: 16% 4. 35-44 years: 15% 4. 0-15 years: 15% 5. 25-34 years: 9% 6. 16-24 years: 5%	1. 55-64 years: 36% 2. 35-44 years: 29% 3. 25-34 years: 21% 4. 45-54 years: 14% 0-15 years: 0%; 16-24 years: 0% and 65+ years: 0%
		Respondents: 14
Type of Group	1. In couples: 55% 2. Family Group: 30% 3. As singles: 13% 4. Social Group: 1%	1. In couples: 71% 2. Family Group: 21% 3. Social Group: 7% As singles: 0% and Educational: 0%
		Respondents: 14
Economic Profile	1. C1: 36% 2. C2: 27% 3. AB: 23% 4. DE: 15%	1. AB: 57% 2. C1: 14% 3. C2: 29% DE: 0%
		Respondents: 13
Main Activity	1. General sightseeing: 27% 2. Shopping: 25% 3. Other: 19% 4. Visiting Attraction: 14% 5. Festival & Events: 7% 6. Walking countryside: 5% 7. Food & Drink: 4% 8. Cycling: 1% Canal trips: 0% and Sports: 0%	1. Other: 38% 2. Visiting Attraction: 23% 2. General sightseeing: 23% 3. Shopping: 8% 4. Food & Drink: 8% Walking countryside: 0%; Cycling: 0%; Sports: 0% and Festival & Events: 0%

Day Visitor Summary

Geographic Location

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

Age Profile

The analysis of the visitor age groupings shows that the vast majority (56%) of visitors fall into the more mature age groups with an almost even split across the 55 to 65, 65+, and 45 to 54 age bandings. The surveys also showed that the 35 to 44 age group was also significant at 15% and children at 15% featured more strongly than in other comparative surveys for the county. This may give an indication for some future market development.

Type of Group

Couples made up the largest percentage of visitor groups at 55% of the visitor survey, with family groups at 30%.

Economic Profile

The socio-economic group ABC1's make up 59% of the visitor survey, with the C1's being the most dominant group at 36%. Whilst one would expect C1 and C2s to feature more strongly in the day visitor surveys compared to staying visitor markets, the surveys also showed a higher C2 representation at 27% than is generally found in other parts of the county.

Main Activity

The visitor survey indicates that General sightseeing at 27% and Shopping at 25% are the main activities undertaken by day visitors. 'Other' which includes visiting friends and relations (VFR) was 19%.

Business Survey - Day Visitor Motivation

Day Visitor Motivation: Of the 15 businesses who responded to the question '*what is the main motivation for day visitors to visit*', the businesses indicated they thought the main motivations were as follows:

1. Rest & Relaxation: 33%
2. Other: 27%
3. Visiting the Countryside: 20%
4. Indulgence: 13%
5. Visiting the towns: 7%
6. History Heritage: 0%

Other:

- Exploring Shropshire in general (town & countryside)
- Canal & river
- Visiting family
- Weddings

Day Visitor Future Markets: In response to the question *'Is there a new or emerging Day Visitor Market you intend to target in the future?'* 4 businesses responded to this question and made the following comments:-

- I would like to attract the camping/caravanning for recreation and water sport activities.
- We will be targeting more groups visits, cyclists etc. Also mums and toddlers.
- Less reliance on 'grey market' targeting families and more events to diversify our package
- No

Day Visitor Survey Notes:

North Shropshire District Visitor Survey 2007

- Only the 'top six' origins of day visitors were cited in this survey.
- 'Other' main activity includes:

Visiting friends and family: 6% and 'other' (visiting a garden centre, going to a market and looking to buy a house): 11%.

Oswestry Borough District Survey 2007

- Only the 'top six' origins of day visitors were cited in this survey.
- 'Other' main activity includes:

Pub/drinking, stop off on way home and visit estate agents: 9% and visiting friends and relatives: 5%.

Whitchurch Destination Benchmarking Survey 2007

- 'Other' main activity includes:

Visiting friends and relatives: 9%; Just passing through: 5%, to visit the TIC: 1%, family history research: 1%, other: 2% (not specified).

Oswestry Destination Benchmarking Survey 2007

- 'Other' main activity includes:

For a specific purpose (e.g. bank/post office/chemist): 8%; Visiting friends and relatives: 6%; To visit a TIC: 2%; Family history research; 1%; just passing through: 1%.

Wem Destination Benchmarking Survey 2007

- 'Other' main activity includes:

Visiting friends and relatives: 20%; for a specific purpose (e.g. bank/post office/chemist): 3%; just passing through: 1%; family history research: 1% and other: 3% (not specified).

Market Drayton Benchmarking Survey 2007:

- 'Other' main activity includes:

Visiting friends and relatives: 16%; for a specific purpose (e.g. bank/post office/chemist): 6%; Business, wedding and nostalgia: 4%; just passing through: 1%.

UK Domestic Staying Visitor Analysis

	Staying Visitors Survey	Business Survey
	Total sample size: 935	Total sample size: 19
		Respondents: 12
Geographic Location	1. North West: 24% 2. West Midlands: 15% 3. London & South East: 5% 4. Wales: 3% 4. Shropshire: 3% 5. South West: 1% 5. North East: 1% 5. East Midlands: 1% 5. Scotland: 1% Northern Ireland: 0%	1. London & South East: 50% 2. West Midlands: 42% 3. North East: 8% South West: 0%; Northern Ireland: 0%; East Midlands: 0%; North West: 0%; Scotland: 0% and Wales: 0%
		Respondents: 12
Age Profile	1. 55-64 years: 23% 2. 65+ years: 19% 3. 45-54 years: 18% 4. 35-44 years: 14% 5. 0-15 years: 13% 6. 25-34 years: 8% 7. 16-24 years: 4%	1. 55-64 years: 33% 2. 25-34 years: 17% 2. 35-44 years: 17% 2. 45-54 years: 17% 2. 65+ years: 17% 0-15 years: 0% and 16-24 years: 0%
		Respondents: 13
Type of Group	1. In couples: 56% 2. Family groups: 32% 3. As singles: 12% 4. Social Group: 1% Educational: 0%	1. In couples: 62% 2. Family groups: 23% 3. As singles: 8% 3. Social Group: 8% Educational: 0%
		Respondents: 12
Economic Profile	1. C1: 37% 2. AB: 29% 3. C2: 24% 4. DE: 12%	1. AB: 67% 2. C2: 25% 3. C1: 8% DE: 0%
		Respondents: 14
Main Activity	1. General sightseeing: 25% 2. Other: 22% 3. Canal trips: 20% 4. Shopping: 14% 5. Visiting Attraction: 7% 6. Festival & Events: 6% 7. Food & Drink: 4% 7. Walking countryside: 4% 8. Cycling: 1% Sports: 0%	1. Visiting Attraction: 21% 1. General sightseeing: 21% 1. Other: 21% 2. Walking countryside: 5% 2. Festival & Events: 5% Shopping: 0%; Food & Drink: 0%; Cycling: 0%; Sports: 0%

UK Domestic Staying Visitor Summary

Geographic Location

The visitor survey identified the three most important locations for UK staying visitor markets for North Shropshire & Oswestry as being the North West at 24%, the West Midlands at 15% and London and the South East at 5% - this latter figure is far lower than other parts of Shropshire where London and the South East feature more strongly.

Age Profile

Over 60% of UK staying visitors fall into the over 45 markets with the largest group being 55 – 64 at 23%. Both surveys suggested the largest age profile for staying visitors is the 55 to 64 age group. It is interesting to note that, like the day visitor results, the 35 to 44 age group was significant at 14% of the visitor survey. This may present an opportunity for future development.

Type of Group

56% of UK domestic staying visitors were travelling as couples or a group of couples usually travelling without children. However the family market still represented 23% of the survey sample. Some 12% were travelling as singles.

Economic Profile

From the visitor surveys AB's and C1's make up some 66% of the UK staying visitor market, again lower than other parts of the county, C2's also had a higher representation than the rest of the county at 24% and DEs represented 12% of the sample. At 36% of the total visitor market C2's and DE's are collectively important for certain types of business and product offers but as staying visitors may not generate the highest rates of return when compared to the more lucrative ABC1 markets.

Main Activity

Visitors will undertake a range of activities when staying in North Shropshire and Oswestry and will give multiple answers. In terms of main responses the visitor survey indicated the primary activities being undertaken by the UK domestic staying visitors as: General Sightseeing 25%, 'Other' (which includes visiting friends and relations) at 22% and (unsurprisingly) canals also featured strongly at 20%. Shopping was 14%.

Business Survey

Staying Visitors type of group: the 1 respondent who selected 'social group' specified 'hen'.

Staying Visitors 'other' main activity: of the 4 respondents who selected 'other', the following activities were specified:

- Exploring Shropshire in general (town & countryside)
- Water sports
- Volunteering / social experience
- Relaxation

Main Motivation: The businesses were asked to identify what they thought the main motivation was for UK domestic staying visitors to visit North Shropshire & Oswestry. 14 responses were received and are as follows:

1. Rest & Relaxation: 43%
2. Visiting the Countryside: 29%
3. Other: 21%
4. Indulgence: 7%
5. History Heritage: 0% and Visiting the Towns: 0%

UK Domestic Staying Visitors Future Markets: Businesses were asked *'Is there a new or emerging Staying Visitor Market you intend to target in the future?'* 6 businesses responded to this question and suggested:

- Small functions/weddings/special occasions
- Younger Clientele
- Camping and caravanning, short stay waters port activities.
- Yes we are intending to renovate to yurts for what is now called 'Glamping'. We hope to rent these out for short breaks from next spring.
- Younger age group – 30-40
- Overseas visitors

UK Domestic Staying Visitor Surveys Notes

North Shropshire District Visitor Survey 2007

- Only the 'top six' origins of UK staying visitors were cited in this survey.
- 'Other' main activity includes:

Visiting friends and family: 10% and 'other' (visiting a garden centre, going to a market and looking to buy a house): 5%.

Oswestry Borough District Survey 2007

- Only the 'top six' origins of UK staying visitors were cited in this survey.
- 'Other' main activity includes:

Pub/drinking, stop off on way home and visit estate agents: 21% and visiting friends and relatives: 21%.

'Other' main activities have not been separated between day and staying visitors within the following surveys: Whitchurch Destination Benchmarking Survey 2007, Oswestry Destination Benchmarking Survey 2007, Wem Destination Benchmarking Survey 2007 and Market Drayton Benchmarking Survey 2007. Therefore, please refer to 'other' activities previously stated after the day visitor analysis.

Overseas Staying Visitor Analysis

	Staying Visitors Survey	Business Survey
	Total sample size: 146	Total sample size: 19
		Respondents: 10
Geographic Location	1. Northern Europe: 21% 2. North America: 15% 3. Australia: 13% 4. Other: 8% 5. New Zealand: 7% 6. Southern Europe: 3% China: 0%; South America: 0%; Southern Africa: 0%; Scandinavia: 0%; India: 0%; Japan: 0% and Northern Africa: 0%	1. North America: 40% 2. Northern Europe: 30% 3. Australia: 20% 4. Scandinavia: 10%
		Respondents: 10
Age Profile	1. 45-54 years: 24% 2. 55-64 years: 21% 3. 35-44 years: 18% 4. 65+ years: 14% 5. 16-24 years: 11% 6. 0-15 years: 8% 7. 25-34 years: 5%	1. 35-44 years: 40% 2. 55-64 years: 30% 3. 45-54 years: 20% 4. 65+ years: 10%
		Respondents: 10
Type of Group	1. In couples: 51% 2. Family groups: 32% 3. As singles: 14% 4. Social Group: 3%	1. In couples: 90% 2. As singles: 10%
		Respondents: 10
Economic Profile	1. AB: 52% 2. C1: 29% 3. DE: 15% 4. C2: 4%	1. AB: 90% 2. C1: 10%
		Respondents: 10
Main Activity	1. General sightseeing: 40% 2. Canals: 17% 3. Visiting Attraction: 12% 4. Festival & Event: 9% 5. Other: 8% 6. Shopping: 6% 7. Walking countryside: 5% 8. Food & Drink: 1% Cycling: 0% and Sports: 0%	1. Visiting Attraction: 40% 2. General sightseeing: 30% 3. Sports: 20% 4. Other: 10%

Overseas Staying Visitor Summary

Geographic Location

North Europe at 21% and North America at 15% and Australia at 13% are the top three overseas countries of origin. However with the low sample size any small variation in the visitor sample could significantly change the emphasis completely. The spread of countries of origin and the low percentage of overseas visitors suggest that in terms of overseas visitors North Shropshire and Oswestry is not a primary destination for the overseas markets. The statistics for Shropshire as a whole suggest that Shropshire is likely to attract the more mature markets, or overseas visitors who have already visited the UK on several previous occasions or those who have a specific/personal connection with the county.

Age Profile

59% of the overseas visitor sample were in the age groups of 45+, with 18% being in the 35 to 44 age group.

Type of Group

The visitor survey sample put 51% as couples travelling without children and 32% travelling as a family.

Economic Profile

ABC1's were again the most important group at 81% in the visitor survey interestingly DEs ranked higher at 15% than C2s at only 4%. This may be due to the more affordable camping options available in the North of the county.

Main Activity

General sightseeing at 40% and Canals at 17% were the highest two cited activities with visiting an attraction at 12%. Shopping and Walking at 6% and 5% respectively were among the lowest activities undertaken.

Business Survey - Overseas Visitors

Overseas 'other' main activity: the 1 respondent who selected 'other' stated 'visiting Ellesmere College'

Main Motivation: The businesses were asked to identify what they thought the main motivation was for overseas visitors to visit North Shropshire & Oswestry. 10 responses were received and are as follows:

1. Other: 30%
1. History Heritage: 30%
2. Rest & Relaxation: 20%
2. Visiting the Countryside: 20%
3. Indulgence: 0% and Visiting the towns: 0%

Overseas 'other' main motivation: 3 respondents ticked 'other':

- Visiting Ellesmere College
- Family history

- There are generally lots of reasons, including visiting family. They make a special effort to visit Fordhall whilst in the country.

New or emerging Overseas Visitor Market:

In response to the question 'Is there a new or emerging Overseas Visitor Market you intend to target in the future?' 1 respondent said, "*We have not fully utilised the overseas tourism market yet. Most of our overseas visitors already know about Fordhall e.g. those that come from America and Australia especially. We need to work on those who don't!*"

Overseas Visitor Surveys Notes

North Shropshire District Visitor Survey 2007

- Only the 'top six' origins of overseas staying visitors were cited in this survey.
- 'Other' main activity includes:

Visiting friends and family: 5%.

Oswestry Borough District Survey 2007

- Only the 'top six' origins of UK staying visitors were cited in this survey.
- 'Other' main activity includes:

Visiting friends and family: 7%.

Whitchurch Destination Benchmarking Survey 2007

Overseas 'other' includes 'Rest of Western Europe' (2); 'Rest of Eastern Europe' (2); 'Rest of Asia'(2) and 'Other overseas' (2).

Oswestry Destination Benchmarking Survey 2007

Only 9 interviewees were from overseas, therefore no analysis by this market segment is possible.

Wem Destination Benchmarking Survey 2007

Only 5 interviewees were from overseas, therefore no analysis of this market segment is possible.

Market Drayton Benchmarking Survey 2007

Only 2% (5 interviewees) of visitors to Market Drayton were from overseas, therefore no analysis of this market segment is possible.

SUMMARY KEY CONCLUSIONS

	Day Visitors	UK Domestic Staying Visitors	Overseas Staying Visitors
Main Geographic location	1. 30min drive time 2. within Shropshire 3. 1 hour drive time	1. North West 2. West Midlands 3. London & South East	1. Northern Europe 2. North America 3. Australia
Main Age Group	45 plus	45 plus	45 plus
Main Type of Group	Couples travelling without children	Couples travelling without children	Couples travelling without children
Main Socio-Economic Group	C1C2	ABC1	AB
Main Activity	1. General sightseeing 2. Shopping	1. General sightseeing 2. Other** 3. Canal trips	1. General sightseeing 2. Canals 3. Visiting Attraction
Suggested Motivations from Business Survey	1. Rest & Relaxation 2. Other* 3. Visiting the Countryside	1. Rest & Relaxation 2. Visiting the Countryside	1. Other** 1. History Heritage 2. Rest & Relaxation

Motivations *Other:

- Exploring Shropshire in general (town & countryside)
- Canal & river
- Visiting family
- Weddings

**Other: see previous breakdowns within this report.

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

Motivational Research Summary

Research commissioned by the former County Council in 2005 and revised in 2008 and conducted by Team Tourism identified several key psychographic groups and segments that offered the best product and market fit for North Shropshire & Oswestry.

((Note: Additional visitor perception and motivation research has been commissioned by Shropshire Council on behalf of the Marches Local Enterprise Partnership. It is recommended that this additional insight is incorporated into the DDP's decisions and any future marketing activities)).

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

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

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

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

Segment	Traditionals (Rest & relaxation)
Key dimensions	
The experiences to be offered to visitors	Relaxing break offering an authentic experience that is special, yet safe. The experience would include sightseeing (market towns, scenic drives etc) local food and drink, speciality shopping, arts and crafts, visiting attractions, museums and gardens, quality cultural events, gentle walking).
Markets and marketing	
Market focus (characteristics of target audience)	<p>Traditionals represent 12.4% of the population. This market will tend to be from older age groups – typically they are aged 46-65. Most of this segment will be post family, and a significant proportion retired. They are predominantly ABC1. This market has reasonable disposable income.</p> <p>They are low users of internet, yet a high proportion (over 40%) do purchase goods using the web.</p> <p>They are the most active weekend break takers and show more interest in England than any other segment.</p> <p>In general, they are likely to undertake some physical exercise, enjoy arts and culture, gardening and listening to the radio. They enjoy visiting a broad range of attractions including churches and historic sites. A good night out involves classical music, theatre, arts or socialising with friends.</p>
Marketing messages, and positioning	<p>The key messages are of rest and relaxation, ‘Be yourself,’ authentic experience, and not following the crowd.</p> <p>For example, describe a short break experience: ‘Stay in a fine country house or cosy B&B, enjoy fine meals’ or stroll along the banks of the river, pick up some art or antiques, see gardens and castles... find some space to breathe, have some time for yourself.</p>
Marketing activities	<p>Specific marketing activities should include:</p> <ul style="list-style-type: none"> • Radio advertising (Classic FM, Magic,) • Editorial features in Gardening magazines, weekend supplements (particularly the Telegraph and Mail) • Weekend features in local papers in North West, East Midlands, M40 corridor • Features in Caravanning magazines • Postcards for direct mail (using bought mailing lists) • Promotion of packages and reader offers to coach and tour operators including joint local press and radio advertising with operators

Segment	Cosmopolitans
Key dimensions	
The experiences to be offered to visitors	<p>Cosmopolitans view themselves as stylish and individualistic (but not fashion followers) although they will happily adopt traditional values when they feel is appropriate. Cosmopolitans enjoy a wide range of activities including drinking and eating out, they appreciate theatre and entertainment and are more likely to visit museums and galleries than historic sites and gardens.</p> <p>On short breaks, although they like city breaks they also like scenic locations. Three out of four weekends will be taken in England rather than abroad.</p>
Markets and marketing	
Market focus (characteristics of target audience)	<p>Demographically this group makes up 15.2% of the population and are a predominantly young segment with over 40% aged under 35 however the mean age is 42. A quarter are pre family and some 38% post family. Typically visiting as couples they would be mainly from ABC1 socio economic groups (although C1s are the predominant segment).</p> <p>They are high technology users but still seek value and functionality.</p> <p>They are risk takers and happy to try new things and experiences. Individuality is important as is individual attention and they are high spenders.</p>
Marketing messages, and positioning	<p>Try something different, away from the crowds, plenty to do and see, discover something new. Independent shops and catering offer will particularly appeal to this segment.</p>
Marketing activities	<ul style="list-style-type: none"> • Develop web and social media platforms • User Generated Content websites • Database and CRM development with new and existing contacts, featuring tailored suggestions and itineraries and offers. • Targeted events and festivals (art/culture) • Independent retail, food, drink and dining offers • Positive editorial coverage in appropriate programmes and publications Countryfile, Country Tracks, food publications, Independent, Guardian, Lonely Planet Rough Guide etc

Segment	Discoverers (Rest and relaxation)
Key dimensions	
The experiences to be offered to visitors	<p>The experience on offer is one of somewhere new and different to explore, with new experiences, ‘surprises’ but easily accessible for a short break or day trip. Specific activities will include sightseeing (particularly off the beaten track), local food and drink, walking, visiting museums and attractions, and speciality shopping.</p> <p>This market will be seeking special breaks using quality self-catering and more exclusive or distinctive hotels and are three times more likely to select a weekend in England than one abroad.</p>
Markets and marketing	
Market focus (characteristics of target audience)	<p>Discoverers are independent thinkers. This group are quite high spenders, and value new products and services as well as new experiences. They also value good service. They live a relatively relaxed pace of life and enjoy intellectual challenges. This group are more likely than most to holiday off the beaten track and are also keen on last minute breaks and self-catering.</p> <p>This particular segment will be from ABC1 socio-economic groups. It is likely to be dominated by post family groups, although any campaign activity should not necessarily ignore families as a potentially emergent group. These are likely to be ‘Caring Families’ who place an emphasis on their children’s development and education within their leisure experiences.</p>
Marketing messages, and positioning	Key messages to this segment are of Shropshire as ‘England undiscovered’, the place you haven’t visited yet, exclusive and authentic, off the traditional tourist trail, space to breathe.
Marketing activities	<p>Specific marketing activities should include:</p> <ul style="list-style-type: none"> • Press advertising in weekend supplements (Independent, Guardian) • Emailing to database of respondents interested in outdoors/quiet places • Media campaign including information provision for independent guidebooks, a proactive editorial programme including creating/selling-in news, features and pictures; advertorial deals including special supplements, readers’ offers and competitions; broadcast-media programme sponsorships/product-placements; strategic display advertising, possibly including TV channels such as the History Channel and National Geographic • Database marketing of special offers

Segment	Sightseeing and Potterers (Day visitors)
Key dimensions	
The experiences to be offered to visitors	“A day away from it”, “A change of scenery” discovering the surprises of Shropshire. Specific activities could include pottering around the market towns and discovering speciality shopping, eating out, may also include gentle country walking this will make use of the rural appeal outside of the towns.
Markets and marketing	
Market focus (characteristics of target audience)	Demographically this group would be relatively broad in its characteristics. Typically visiting as couples and generally 45 plus. They would be mainly from ABC1 socio economic groups (although C2s would also be important).
Marketing messages, and positioning	Take a day to live the life you want to live, be who you want to be, expand your horizons, clear your mind
Marketing activities	<ul style="list-style-type: none"> • Editorial coverage through database of contacts with local TV, radio stations and newspapers in Birmingham, Stoke on Trent, Worcestershire, Manchester, Liverpool, Wales (both BBC and commercial stations). • Regularly supply press stories on events, special attractions, stories • Above the line advertising campaign featuring commercial radio stations and local and regional press • Database and CRM development with new and existing contacts, featuring forthcoming tailored events and day trip itineraries • Direct promotion via banner poster campaigns within the geographic locations

SECTION 2: THE PRODUCT & VISITOR OFFER

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

These ‘needs’ could be seeking rest and relaxation, spending quality time with friends or family, experiencing a specific event, or even meeting a perceived idea of what visiting an area may give them - such as taking long walks in the countryside, having a pub meal by a roaring fire, ambling around the shops or taking in the sights etc. These perceived ideas are equally important to the visitor as any physical need and the destination should meet the perceived ideas as much as meeting the visitors’ actual needs.

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

North Shropshire and Oswestry has a diverse and distinct visitor offer which will appeal to all of its primary visitor markets. The area is an integral part of the Shropshire visitor offer and the Shropshire visitor offer is an integral part of North Shropshire and Oswestry’s visitor offer. The other main visitor drivers for Shropshire are Shrewsbury, Ironbridge, Ludlow and the Shropshire Hills. North Shropshire and Oswestry’s connection with these drivers and its setting within an unspoilt rural county should not be overlooked in any marketing plan promoting the town.

The North Shropshire & Oswestry Tourism Conference last year, identified the ‘big themes’ for the area as being:

- Canals (canal users)
- Walking & cycling
- Landscapes
- Accessibility & central location
- Diverse attractions including excellent gardens
- Heritage
- Food & Drink
- Events
- Golf (& other sport activity & facilities)

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

Primary Drivers for North Shropshire & Oswestry	Products	The Visitor Offer (Experience)
<p>TRADITIONAL MARKET TOWNS</p> <p>Support Drivers Villages in and around Oswestry & North Shropshire</p> <p>Canals Landscapes & rural countryside offer Outdoor Activities History & Heritage Location</p> <p>Shropshire's main drivers of Shrewsbury, Ironbridge & Ludlow</p>	<p>Oswestry, Ellesmere, Wem, Whitchurch and Market Drayton:</p> <p>All: Independent shops Food & Drink (places to eat & drink & local food producers) Historic buildings (retail setting) Warm welcome Events & Festivals</p> <p>Oswestry: Markets, events & festivals, music scene e.g. Osfest. Canals, Aqueducts, Heritage Centre, Cambrian Railway.</p> <p>Ellesmere: Canal, Mere & Sculpture Trail</p> <p>Wem: Sweet Pea Festival, Mythstories, Lower Lacon Caravan Park, Hawkstone Follies</p> <p>Whitchurch: Canal, Grindley Locks, Heritage centre, Long Distance walks, JB Joyce</p> <p>Market Drayton: Canal, Clive of India, Gingerbread, Town Trails</p>	<p>Experience independent shops and old fashioned service in traditional market towns.</p> <p>A chance to buy and experience some good quality, honest, locally sourced food and drink.</p> <p>An undemanding, unrushed and uncrowded chance to pass the time, take in the sights and shops.</p> <p>Experience safe, secure and unspoilt towns.</p>
<p>CANALS</p> <p>Support Drivers Market towns Landscapes & Countryside Outdoor activities History & Heritage Location</p>	<p>Pontcysyllte World Heritage Site Shropshire Union Canal Llangollen Canal Ellesmere British Waterways Yard Walks along canals Market towns on Canals</p>	<p>Take a stroll alongside the canal and into town...</p> <p>N.B. work to be done strengthening the association of the area and towns with canals and making the experience more enjoyable and accessible. The potential is in canals as a waterside landscape and leisure environment, not in more boaters.</p>
<p>LANDSCAPES & COUNTRYSIDE</p> <p>Support Drivers Walking, cycling, riding & other outdoor activities Wildlife Market towns and Villages</p>	<p>Unspoilt Scenery & views National Nature reserves, e.g. Fenns, Whixall and Bettisfield Mosses Grinshill and Corbet Wood Llanymynech Rock, Oswestry Prees Heath Common Reserve, Whitchurch Wood Lane Nature Reserve, Ellesmere Ifton Meadows, Oswestry</p>	<p>A chance to rest, relax and re-charge in unspoilt surroundings.</p> <p>Get away from it all; experience and (safely) access the countryside.</p> <p>A chance to get some fresh air, maybe some gentle exercise.</p>

Canals History & Heritage Location Food & drink, local produce & farm shops	The Mere, Ellesmere Colemere, Ellesmere Wem Moss, Wem Brown Moss, Whitchurch Hawkstone Park & Follies Sites of Special Scientific Interest, e.g. Colemere Country Park Walking: Offa's Dyke path developments, Sandstone Trail, The Shropshire Way Cycling routes Horse riding opportunities Fishing, e.g. at Dearnford Lake Golf: Proliferation of golf clubs in north of County	
LOCATION	Proximity to: Primary drivers of Shrewsbury, Ironbridge & Ludlow Mid and North Wales/Welsh hills Chester & Cheshire M6, Stoke & The Potteries Castles of North Wales	An ideal base from which to explore Shropshire, the Welsh borders and neighbouring counties. Easy routes and connections.
ATTRACTIONS Support Drivers Market towns Canals Landscape & Countryside Location History & Heritage	Gardens, nurseries & plant centres e.g. Dorothy Clive Garden, Wollerton Old Hall Garden, Hodnet Hall Gardens, Hawkstone Historic Park & Follies Castles & Forts, e.g. Whittington, Moreton Corbet, Old Oswestry Hillfort Farm attractions, e.g. Park Hall Countryside Experience, Fordhall and farm shops	Diverse range of attractions that are undemanding and not over crowded.
HISTORY & HERITAGE Support Drivers Myths & Legends, e.g. King Arthur	The market towns Castles & Forts Llanymynech Heritage Area Cambrian Heritage Railways & Oswestry Transport Museum Oswestry Visitor & Exhibition Centre Whitchurch Heritage Centre The Story of Drayton Mythstories Museum	Experience 'real' England and connect with the past, get back to a quieter way of life Discover something new and take time to explore at a leisurely pace.

It was not part of the brief to develop creative propositions or brand position statements but the suggested visitor offer/experiences have been put forward to provide an essence of North Shropshire and Oswestry's visitor offer and encourage further discussion with a view to provide a basis for developing the brand position and core marketing messaging for future communications.

The suggested visitor offer are not in themselves proposed marketing strap-lines or indeed being suggested as the finished article. It is recommended that a marketing

working group is formed by North Shropshire & Oswestry DDP in order to develop the area's marketing proposition further with an intention to create a brief to invite destination marketing and brand development companies to submit proposals to take the brand and messaging forward and deliver the creative element of North Shropshire and Oswestry's marketing communications.

Key thoughts from the North Shropshire & Oswestry Tourism Conference were identified as opportunities to:

- Strengthen associations between
 - a) the canals and Oswestry & North Shropshire (as an area)
 - b) the canals & individual market towns, i.e. Oswestry, Ellesmere, Wem, Whitchurch and Market Drayton.
- Increase spend in the market towns by positioning them as 'attractions' in their own right; a key supporting driver to the rural countryside offer
- Develop the walking product, especially 'waterside' walks. It has been identified that the north east area of Shropshire is comparatively weak for good walking routes & footpaths. However, it has been suggested that the North West of Shropshire (Offa's Dyke) could be promoted as a 'connoisseurs' alternative to the better known Shropshire Hills AONB.
- Develop & promote the cycling product in Oswestry & North Shropshire.
- Work with local businesses and markets to complete links with the countryside & farming to establish the area as an authentic food destination.

Development Priorities from the North Shropshire & Oswestry Tourism Conference were identified as:

- 1. Waterways Triangle: World Heritage Site/ Ellesmere/ Llanymynech**
 - Shropshire Gateway and further development of access and interpretation to the World Heritage Site
 - Montgomery Canal Restoration to Llanymynech
 - Private sector development of appropriate leisure & tourism facilities
 - Ellesmere British Waterways Yard
 - Ellesmere Sculpture Trail
 - Town & village enhancement – Oswestry, Llanymynech and Ellesmere
 - Trails, links & cross marketing initiatives
 - Oswestry as a hub; strengthening links and associations with the World Heritage Site, the town and heritage enhancement, its border/ 'old Oswestry'
 - Long term – developing the Cambrian railways as a major heritage attraction in Oswestry
 - Emphasis on targeting staying & touring visitors (UK especially North West, West Midlands, Wales, Shropshire)
- 2. Whitchurch hub**
 - Strengthen links to, and promotion of the canal environment
 - Walks development
 - Town enhancement
 - Hub for Meres & Mosses landscape (including into Cheshire)

- Emphasis on targeting day visitors (Shropshire, Potteries, Cheshire & North West)

3. Market Drayton hub

- Strengthen links to, and promotion of the canal environment
- Walks development – short circular walks using canal and links to other attractions/walks
- Town enhancement
- Emphasis on day & touring visitors (Shropshire, Potteries & Shrewsbury)

4. Northern Shropshire as part of Shropshire

- Increase the areas capacity and ability to benefit from the marketing of Shropshire, and attract visitors to ‘driver’ locations e.g. Shrewsbury & Ironbridge, and also to Pontcysyllte World Heritage Site.
- Accommodation - anecdotal evidence has suggested a lack of serviced accommodation.
- Quality – initiatives to improve quality & ensure that attractions, accommodation, towns & villages that are appropriate for the primary target markets. e.g. shops that look attractive and are open at right times; upgrades to accommodation; family friendly clusters (family visitors more important in northern area)
- Getting visitors into the towns – signage, information (including digital), events (need not be ‘tourist’ events), trails & activities, flagship businesses – invest and promote.
- Cross-selling - Still much more potential across the whole area for marketing the destination and cross selling; increasing local knowledge and providing a means for businesses to promote the area’s attractions, capitalising on location and accessibility.

(Please note that although it has been suggested that there could be more caravan and camping sites, North Shropshire and Oswestry does have a significant concentration of existing sites.)

Previous consumer research has identified how visitors perceive Shropshire in terms of a destination brand and it has also shown that much of Shropshire’s brand values are reinforced and supported by the product and visitor offer in North Shropshire & Oswestry.

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

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

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

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

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

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

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

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

The main marketing objective for developing the visitor markets in North Shropshire and Oswestry are to increase the economic and social contribution that tourism can bring to the town and its surrounding area. This can be achieved by growing market share of the primary visitor markets, attracting new visitor segments and increasing both visitor spend and dwell time.

Based on the research analysis the primary markets for North Shropshire & Oswestry DDP to develop are recommended as follows:

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

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

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

i). Raising Awareness of North Shropshire and Oswestry as a visitor destination worthy of consideration by the target markets

ii). Presenting North Shropshire and Oswestry drivers, products and themes as a compelling visitor ‘offer’ (experience) to these target markets, using a distinctive style and tone in all communications

iii). Providing potential visitors with easy and clear routes to find further information about North Shropshire and Oswestry and ultimately ‘purchase’ the product

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

In developing the marketing plan the recommendations reflect the most appropriate and balanced mix of routes or methods to reach the identified target markets North Shropshire and Oswestry is recommended to develop.

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

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

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

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

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

The following marketing action plan identifies a range of possible marketing activities for consideration by the Destination Development Partnership and gives an indication of their recommended priority ranking in terms of importance. Their ultimate

deliverability will be wholly dependent on the actual marketing resources available and should more resources become available then priority actions can be proportionally increased by volume and value i.e. more advertising, more brochure distribution, etc. or additional new activity can be conducted.

As previously stated, additional perception and motivational research has been commissioned by Shropshire Council on behalf of the Marches Local Enterprise Partnership, and conducted by Arkenford. The results of this latest research will be incorporated into the overarching document that ties together the standalone but complementary strategies for North Shropshire & Oswestry, Shrewsbury and the Shropshire Hills & Ludlow.

SECTION 3: THE MARKETING PLAN & RECOMMENDATIONS

3.1 Promotion (Offline)

Day Visitor Guide

Shropshire Council commissioned Shropshire Tourism to produce a Discovery Map for North Shropshire and Oswestry in 2011. This A5 16 page guide had a print run of 50,000 copies and was supported by a targeted distribution campaign to Shropshire & regional Visitor Information Centres, local Information Points and key outlets in surrounding counties including North Wales, the North West, Cheshire, Staffordshire and the West Midlands. It was supported by a relatively small proportion of private sector advertising.

Prior to this funding has also been available to produce a King Arthur leaflet (still in circulation but with limited copies remaining) and undertake a golf marketing campaign. The Shropshire golf brochure is now out of date; although golf is a niche market there are more golf clubs in and around the North Shropshire and Oswestry area than the rest of the county that could potentially benefit from updating and reprinting this leaflet.

Various informational town guides and leaflets also exist, whether they are for specific attractions, or contain information about particular town events. Targeted leaflets could be developed further into a series of leaflets that promote the main drivers for North Shropshire & Oswestry. e.g. history and heritage, landscapes and countryside and so on. These would promote the different aspects of the visitor offer and help promote the area, adding value to the visitor experience, prolonging visitor stay and encouraging movement around the area.

The day visitor markets for North Shropshire & Oswestry still use print and brochures as a source of information so it is therefore suggested that consideration be given to producing another day visitor guide with a similar print run to the 2011 Discovery Map. There may well also be advertising opportunities that could generate additional income for this production. The content of this guide could also be expanded to include golf clubs and things to see and do on the ground that relate the history and heritage and myths and legends of North Shropshire and Oswestry. It should also include the market towns, shops, food & drink establishments, and highlight key events.

Staying Visitor Guide

Oswestry Borderland Tourism continues to produce the annual “Escape to Oswestry” brochure which contains accommodation, attractions, places to eat and drink and a town map, etc. North Shropshire Tourism ceased production of their ‘Essential Shropshire’ brochure for staying visitors in 2010, due to a lack of support from advertisers.

However, the staying visitor markets still use traditional brochures and visitor guides both as a source of information on an area but also as a key part of their decision making processes. It is therefore suggested that the Oswestry visitor guide is continued in order to grow the domestic staying visitor market, but that it is a joint publication for Oswestry *and* North Shropshire.

It has long been recognised that visitors to North Shropshire travel to Oswestry and the borders and vice versa. It is recommended that North Shropshire and DDP helps to

facilitate closer working with Oswestry Borderland Tourism and North Shropshire Tourism to achieve this objective. A collaborative approach would better ensure that limited marketing budgets are directed to one integrated staying visitor brochure that better sells the area and is ultimately more effective for the industry.

The print run and distribution should be reviewed and use of the guide for visitors already in North Shropshire & Oswestry should be limited. Enhanced distribution could also be achieved by use of a spring and autumn response campaign targeting potential new visitors that match the core staying markets from within the identified target geographic areas.

The production should contain more of a destination 'sell' that avoids cliché's and bland statements, e.g. 'something for everyone' that do nothing to create a brand identity for the area. Further consideration could also be given to incorporating QR (Quick Recognition) codes as these may provide greater interpretation opportunities.

Creative Development & Support

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

Awareness Raising Advertisements

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

It is recommended in light of the low awareness levels of what North Shropshire and Oswestry can offer possible visitors, resource is put towards a concerted awareness raising campaign and it is entirely focussed on increasing the profile of North Shropshire and Oswestry as a potential place to visit amongst the target audience.

Billboards and Posters

There are three suggested strands to an outdoor advertising campaign; a local approach, a regional approach and a national approach. The local posters and billboards could reach a large number of passing vehicles on key routes passing the main market towns or using the main A5, A51, A458 and A49. They would also help raise awareness of the area's offer and can also be used to promote events and help attract day visitors from the immediate surrounding area.

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

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

Coach Tour Packs/Itineraries

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

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

Travel Trade Promotions & Shows

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

3.2 Promotion (Online)

Destination Website Development

As internet usage amongst the target markets grows the main destination websites www.northshropshire.co.uk and www.oswestry-welshborders.org.uk will increase in importance and become over time the main marketing platforms.

www.northshropshire.co.uk is currently provided by North Shropshire Tourism and hosted by Shropshire Tourism. There has been additional investment made into this website over the past few years which has seen the visitor offer become more diverse and inclusive. In order to sustain the website accommodation and attractions members pay to go on the website, events are provided free entry, and Shropshire Tourism are currently recommending to North Shropshire Tourism that the website is further developed to include entries for retail and catering businesses. Some members of North Shropshire Tourism are located in Oswestry and so feature on this website.

The content has significantly improved and navigation has been made clearer and simpler for the visitor to use. Attracting some 22,500 unique visits per annum this website provides both information and the destination sell.

It is also recommended that further investment is made in the site to make the visitor offer more engaging and to better sell the destination. Recommendations would strengthen the website – e.g. use of ‘the best place to’: eat, shop, relax, discover, etc or what to do in 2 hours in North Shropshire and Oswestry would help the visitor better understand what the area has and what they could imagine themselves doing when visiting. Consideration should also be given to making the site more transactional with download vouchers and accommodation booking systems.

www.oswestry-welshborders.org.uk is run by Oswestry Borderland Tourism and is focused on Oswestry. There does not appear to be information about the other market towns in North Shropshire. Unfortunately this website does feature some ungraded accommodation businesses and because of this, cannot be linked with the other tourism sites in the county, including www.northshropshire.co.uk, owing to the county-wide policy of only promoting 100% inspected and graded properties.

The Best of Oswestry website is also a useful resource, but it is not solely targeted at the visitor market.

Database Development

There are existing databases of past brochure requests and enquiries made to the visitor information centres. It is recommended that a new centralised database is developed for North Shropshire and Oswestry and that Shropshire Council act as data stewards on behalf of the Destination Development Partnership. With more specific field usage this could provide a means of up-selling and cross-selling that is not being exploited at the moment.

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

A facility for visitors to sign up and register for information, events, news, special offers, etc could also be added to the main destination websites.

E:Newsletters & Offers

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

Social Media Management

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

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

Whilst North Shropshire and Oswestry should have both a Facebook and Twitter account, the amount of time and resource allocated to this activity should be proportional to its likely benefit. Consideration should also be given to developing Flickr content and using blogs and forums as a means of increasing consumer engagement.

YouTube

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

Video Images online

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

Viral Campaigns

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

Creative Development & Support

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

3.3 Direct Response Activity

Response Adverts & Fulfilment

Whilst much of what has been proposed has been about raising awareness and engagement, the primary objective of any marketing strategy is to produce measurable and tangible growth in the market place. It is recommended that consideration is given to regular spring and autumn response campaigns to generate new staying visitors coming to North Shropshire and Oswestry.

Mailers

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

Integrated Offers

The highly successful Marylebone Railway and Hotel offer run by Shrewsbury Tourism Association proved that there is both consumer demand and uptake of packaged offers for the short break markets.

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

Creative Development

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

3.4 Press & PR

Press PR Campaign

North Shropshire and Oswestry has been the beneficiary of significant and positive press and PR, as has Shropshire. For example, the 2010 Northern Area Partnership campaign generated over £18,000 worth of coverage with a budget of £3,750.

This is an effective and affordable means of raising awareness and reaching specific target markets. It is recommended that consideration is given to retaining a press PR agent with contacts in the mainstream media (not just travel trade as this has limited

market reach) and consideration is also given to allocating resource to an in-house point of contact to develop the media profile of the area.

Hosting Journalists

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

Media Packs

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

3.5 General Marketing Support Tools

Create the Brand 'bible' for North Shropshire and Oswestry

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

North Shropshire and Oswestry should be more than simply about tourism and should cover the wider economic and social wellbeing of the area. A brand 'bible' can also be used to influence inward investment messaging, attracting new residents and for projecting internal messages too.

Although the content in this document is about tourism marketing it is recommended that consideration is given to developing a wider brand 'bible' to cover the much broader range of 'place marketing' which includes all economic and social communications.

Photography

The current image library does not adequately portray the market towns, the rural area and its visitor offer. New images are urgently required to support print, websites and press activity that shows real visitors in real places, mindful of the target markets North Shropshire and Oswestry is seeking to attract. Images should be of the highest quality and creativity and wholly complement the brand guidelines and inspire and resonate with the target markets.

Video Clips

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

CDs/USBs

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

North Shropshire and Oswestry Merchandise

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

Creative Development & Support

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

Ambassadors Development/Training

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

SECTION 4: MARKETING PRIORITY SUGGESTIONS:-

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

Survey Notes Annex 1:

Collated Visitor Surveys

Visitor Survey Percentages

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

Age Profile

Calculation of overseas visitors

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

Type of Group

For comparative purposes groups have been interpreted as follows:

Adult groups and adult couples are grouped together and classed as 'in couples'.

Solo adult are classed as 'singles'

Adults with children are classed as 'family group'

Touring visitors

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

Business Survey

Due to the nature of the business survey being undertaken which included responses and views from several non tourism businesses and other organisations, the individual results for each section have been presented as a percentage of those who responded only to the questions and not the entire business sample. With the low sample size and the fact that the views obtained are subjective, we would advise that they should be tested in the market place. As with the visitor survey percentage, they have been rounded so may not add to 100%, or where multiple answers have been received they may add to over 100%.

General Notes

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

Definitions

AB: Professional, managerial, affluent pensioners

C1: Supervisory, junior management

C2: Worker/employees, self-employed

DE: Unemployed, students, state pensioners

VFR: Visiting Friends and relatives

Annex 2: Business Survey Questionnaire

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

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

The survey is going out to around 300 businesses in North Shropshire & Oswestry and the surrounding area and will ultimately go to over 1,000 businesses throughout Shropshire and will cover a diverse range of tourism and visitor related businesses.

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

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

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

Thank you for participating.

Kind Regards,



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

Primary Visitor Markets Analysis Survey

About Your Business:

Location: Postcode:

Accommodation:

- | | |
|--|--|
| <input type="checkbox"/> Hotel | <input type="checkbox"/> B&B |
| <input type="checkbox"/> Self catering | <input type="checkbox"/> Caravan Camping |

Attraction:

- | | |
|--|---|
| <input type="checkbox"/> Historic Site | <input type="checkbox"/> Heritage property/castle stately home |
| <input type="checkbox"/> Museum | <input type="checkbox"/> Countryside Site |
| <input type="checkbox"/> Religious Site | <input type="checkbox"/> Farm Attraction |
| <input type="checkbox"/> Entertainment Venue | <input type="checkbox"/> Activity Provider (please specify below) |

Retail:

- | | |
|---|--|
| <input type="checkbox"/> Clothes Fashion | <input type="checkbox"/> Jewellery |
| <input type="checkbox"/> Arts & Crafts Gallery | <input type="checkbox"/> Antiques |
| <input type="checkbox"/> Gifts Souvenirs | <input type="checkbox"/> General Goods |
| <input type="checkbox"/> Other (please specify below) | |

Catering:

- | | |
|---|----------------------------------|
| <input type="checkbox"/> Food & Drink | <input type="checkbox"/> Pub Inn |
| <input type="checkbox"/> Restaurant | <input type="checkbox"/> Café |
| <input type="checkbox"/> Other (please specify below) | |

Main Visitor Markets

Day Visitors

Geographic Location:

- | | |
|--|--|
| <input type="checkbox"/> Within Shropshire | <input type="checkbox"/> ½ Hour Drive Time |
| <input type="checkbox"/> 1 Hour Drive Time | <input type="checkbox"/> 1 ½ Hour Drive Time |
| <input type="checkbox"/> 2 Hour Drive Time | <input type="checkbox"/> Longer |

Age Profile (Main Visitors)

- | | | | |
|-----------------------------------|----------------------------------|----------------------------------|----------------------------------|
| <input type="checkbox"/> Under 25 | <input type="checkbox"/> 31 – 35 | <input type="checkbox"/> 36 – 45 | <input type="checkbox"/> 46 – 50 |
| <input type="checkbox"/> 26 – 30 | <input type="checkbox"/> 56 – 60 | <input type="checkbox"/> 61 – 65 | <input type="checkbox"/> 65+ |
| <input type="checkbox"/> 51 -55 | | | |

Type of Group:

- | | |
|--|--------------------------------------|
| <input type="checkbox"/> As Singles | <input type="checkbox"/> In Couples |
| <input type="checkbox"/> Family Group | <input type="checkbox"/> Educational |
| <input type="checkbox"/> Social Group (WI, Hen/Stag/Company/Membership - please specify below) | |

Economic Profile:

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

Primary Activity Being Undertaken:

- | | |
|---|--|
| <input type="checkbox"/> Shopping | <input type="checkbox"/> Food & Drink |
| <input type="checkbox"/> Visiting Attraction | <input type="checkbox"/> General Sightseeing |
| <input type="checkbox"/> Walking Countryside | <input type="checkbox"/> Cycling |
| <input type="checkbox"/> Sports | <input type="checkbox"/> Festival & Events |
| <input type="checkbox"/> Other (please specify below) | |

Main Motivation:

- | | |
|---|---|
| <input type="checkbox"/> Rest & Relaxation | <input type="checkbox"/> Indulgence |
| <input type="checkbox"/> History Heritage | <input type="checkbox"/> Visiting the Countryside |
| <input type="checkbox"/> Visiting the Towns | <input type="checkbox"/> Other (please specify below) |

Staying Visitors (UK Domestic)

Geographic Location:

- | | |
|---|--|
| <input type="checkbox"/> West Midlands | <input type="checkbox"/> London & South East |
| <input type="checkbox"/> South West | <input type="checkbox"/> North West |
| <input type="checkbox"/> North East | <input type="checkbox"/> Scotland |
| <input type="checkbox"/> Northern Ireland | <input type="checkbox"/> Wales |
| <input type="checkbox"/> East Midlands | |

Age Profile (Main Visitors)

- | | | | |
|-----------------------------------|----------------------------------|----------------------------------|----------------------------------|
| <input type="checkbox"/> Under 25 | | | |
| <input type="checkbox"/> 26 – 30 | <input type="checkbox"/> 31 – 35 | <input type="checkbox"/> 36 – 45 | <input type="checkbox"/> 46 – 50 |
| <input type="checkbox"/> 51 -55 | <input type="checkbox"/> 56 – 60 | <input type="checkbox"/> 61 – 65 | <input type="checkbox"/> 65+ |

Type of Group:

- | | |
|--|--------------------------------------|
| <input type="checkbox"/> As Singles | <input type="checkbox"/> In Couples |
| <input type="checkbox"/> Family Group | <input type="checkbox"/> Educational |
| <input type="checkbox"/> Social Group (WI, Hen/Stag/Company/Membership - please specify below) | |

Economic Profile:

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

Primary Activity Being Undertaken:

- | | |
|---|--|
| <input type="checkbox"/> Shopping | <input type="checkbox"/> Food & Drink |
| <input type="checkbox"/> Visiting Attraction | <input type="checkbox"/> General Sightseeing |
| <input type="checkbox"/> Walking Countryside | <input type="checkbox"/> Cycling |
| <input type="checkbox"/> Sports | <input type="checkbox"/> Festival & Events |
| <input type="checkbox"/> Other (please specify below) | |

Main Motivation:

- | | |
|---|---|
| <input type="checkbox"/> Rest & Relaxation | <input type="checkbox"/> Indulgence |
| <input type="checkbox"/> History Heritage | <input type="checkbox"/> Visiting the Countryside |
| <input type="checkbox"/> Visiting the Towns | <input type="checkbox"/> Other (please specify below) |

Staying Visitors (Overseas)

Geographic Location:

- | | |
|---|--|
| <input type="checkbox"/> Northern Europe | <input type="checkbox"/> Scandinavia |
| <input type="checkbox"/> North America | <input type="checkbox"/> Australia |
| <input type="checkbox"/> New Zealand | <input type="checkbox"/> India |
| <input type="checkbox"/> China | <input type="checkbox"/> Japan |
| <input type="checkbox"/> South America | <input type="checkbox"/> Southern Europe |
| <input type="checkbox"/> Southern Africa | <input type="checkbox"/> Northern Africa |
| <input type="checkbox"/> Other (please specify below) | |

Age Profile (Main Visitors)

- | | | | |
|-----------------------------------|----------------------------------|----------------------------------|----------------------------------|
| <input type="checkbox"/> Under 25 | | | |
| <input type="checkbox"/> 26 – 30 | <input type="checkbox"/> 31 – 35 | <input type="checkbox"/> 36 – 45 | <input type="checkbox"/> 46 – 50 |
| <input type="checkbox"/> 51 -55 | <input type="checkbox"/> 56 – 60 | <input type="checkbox"/> 61 – 65 | <input type="checkbox"/> 65+ |

Type of Group:

- | | |
|--|--------------------------------------|
| <input type="checkbox"/> As Singles | <input type="checkbox"/> In Couples |
| <input type="checkbox"/> Family Group | <input type="checkbox"/> Educational |
| <input type="checkbox"/> Social Group (WI, Hen/Stag/Company/Membership - please specify below) | |

Economic Profile:

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

Primary Activity Being Undertaken:

- | | |
|---|--|
| <input type="checkbox"/> Shopping | <input type="checkbox"/> Food & Drink |
| <input type="checkbox"/> Visiting Attraction | <input type="checkbox"/> General Sightseeing |
| <input type="checkbox"/> Walking Countryside | <input type="checkbox"/> Cycling |
| <input type="checkbox"/> Sports | <input type="checkbox"/> Festival & Events |
| <input type="checkbox"/> Other (please specify below) | |

Main Motivation:

- | | |
|---|---|
| <input type="checkbox"/> Rest & Relaxation | <input type="checkbox"/> Indulgence |
| <input type="checkbox"/> History Heritage | <input type="checkbox"/> Visiting the Countryside |
| <input type="checkbox"/> Visiting the Towns | <input type="checkbox"/> Other (please specify below) |