FINAL DRAFT

Shropshire Destination Management Plan 2023-2025

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1.Foreword

Since January 2021, Shropshire Council has facilitated a programme of strategic initiatives to support Shropshire's visitor economy and address long-standing issues with fragmented destination management, limited marketing and low awareness of Shropshire as a quality tourism destination. This programme has underpinned the sector's recovery from the COVID pandemic and funding from central government's Additional Restrictions Grant Fund enabled the work to take place.

A programme of strategic tourism plans has been delivered by Shropshire Council with the support of two tourism industry and destination management consultants. Central to this work has been the development of the Shropshire Destination Management Plan 2023 – 2025 (DMP) which is detailed in this document.

The DMP has been created to work in conjunction with Shropshire Council's wider strategic plans, notably the Economic Growth Strategy 2022 – 2027. Importantly it will support delivery of the Shropshire Plan 2022 – 2025 priorities as follows:

Healthy Economy - We will develop Shropshire as a vibrant destination for people that attracts people want to live in, work, learn and visit.
The Shropshire DMP will provide impetus and direction for future growth from tourism, helping the sector to gain credibility and recognition as an important driver of the county's economy. Increased spend from visitors means higher revenue and profit which businesses can reinvest, creating better quality experiences for visitors and more jobs for local people.

Healthy People - We will support Shropshire residents to take responsibility for their own health and wellbeing, choosing healthy lifestyles and preventing ill-health, reducing need for long term or hospital care.
Health and wellbeing is connected to enjoyment of the outdoors, access to green spaces, and opportunities for exercise, as is exposure to stimulating and inspiring cultural places. The DMP's emphasis on providing special experiences, development of Shropshire's offer to visitors, protecting and managing our landscape assets and improving accessibility to outdoor spaces will benefit the resident population as well as visitors.

Healthy Environment - We will maintain, protect, and enhance our outstanding natural environment, promoting positive behaviours and greater biodiversity and environmental sustainability.
Delivery of the DMP will embed sustainability principles into tourism development, ensuring that our exceptional natural and built environment assets remain available to visitors for decades to come. Supporting businesses to adopt sustainable practices will make them more attractive to visitors with an environmental conscience and burnish Shropshire's credentials as an environmentally responsible destination.

Healthy Organisation - We will communicate clearly and transparently about what Shropshire Council delivers, signposting to the right places for services and support.
Shropshire Council's Culture, Leisure and Tourism team will play an instrumental role in communicating what Shropshire has to offer as a best-in-class tourism destination and what it is the council directly delivers to residents and visitors alike through its own venues and cultural offer.

Shropshire Council looks forward to supporting the development of an implementation plan for the Destination Management Plan 2022- 2025 and will help to facilitate the delivery of its objectives and core priorities.

2.Introduction

The Shropshire Destination Management Plan (DMP) is the blueprint for how the county intends to manage its visitor economy between 2023 and 2025. Shropshire has not had a whole county plan for some years. Under the leadership of Shropshire Council, a new partnership is emerging comprising people and organisations from across the public and private sectors with a stake in future success. Collectively, this partnership has identified priorities and related actions that will begin to transform Shropshire as a visitor destination.

The plan is a fresh start for Shropshire. It provides impetus and direction for everyone in the county with a stake in the sector. It helps the sector to gain credibility and recognition as an important driver of the county's economy. It articulates visitor economy priorities to be fed into local and regional plans. It draws on best practice from elsewhere but also tries to retain a keen sense of what will be right for Shropshire. It is an important reference document for future funding and a basis for future bids into government programmes. It can be used by developers and tourism businesses to shape their investment and it will inform, guide, and influence how resources are used and allocated.

This is intended to be a living document that is periodically reviewed and adjusted to take account of the operating environment (political and financial), the needs and expectations of consumers, businesses and communities, as well as opportunities to develop new products and propositions. The list of priorities and actions is intentionally short so that success can be easily tracked and attributed. The plan will be reviewed in Autumn 2023.

3.Context

The Shropshire Destination Management plan exists in a national, regional, and local context that is constantly changing. Visit England’s ten-year Strategic Framework for Tourism in England expired in 2020 and has not been replaced. Initiatives designed to kick in at the beginning of this decade included the Tourism sector deal and the tourism chapter of the Industrial strategy. However, the Covid pandemic has set aside these plans.

Replacing them is the Tourism Recovery plan published June 2021 and the De Bois Review into England’s DMO (destination management organisation) landscape. The Tourism Recovery Plan emphasises the importance of the sector to the UK economy and how catastrophically Covid has affected it. It highlights the need to deliver support and longer-term aspirations for upskilling, especially digitally, and a more extensive data to evaluate heath and growth. It also commits to ensuring that every part of the UK is included. The De Bois Review, which has been welcomed by the sector for its forensic analysis of the sector and it pragmatic approach to future structures and funding, prioritises aggregation of DMOs, collaboration between DMOs both geographically and thematically, and a much tighter regime of accreditation. Implementation depends on funding from central government.

Shropshire has its own recovery plan that includes a Covid recovery marketing campaign, a review of tourism management arrangements and production of this Destination Management Plan to help all stakeholders focus on what is important and what will be effective.

The overriding objectives of the Shropshire recovery plan are to support the sector to thrive, to promote partnerships between tourism and related sectors, particularly culture and landscape management, to become a credible regional player on tourism initiatives as part of the West Midlands and the Marches LEP area, and to ensure that Shropshire can take advantage of future funding opportunities at the national level. When the next Discover England Fund comes along, Shropshire, which received no funding in the previous round, should be able to participate and benefit.

This is imperative as Shropshire is surrounded by geographies and authorities with tourism strategies that are well developed. For example, in 2019 just before the advent of Covid, the West Midlands Combined Authority launched a £1b Tourism Strategy.

In 2021 Herefordshire Council sponsored a successful Destination Bid for the county which will deliver circa £400k per annum, the bulk of which is earmarked to promote their visitor economy. In 2020 the Welsh Government refreshed its tourism strategy whose centralised approach has delivered both increased awareness and growth across Wales. And of course, in 2019 the Marches LEP funded its own tourism strategy which has informed some aspects of this DMP. It is therefore important to recognise that in future collaboration, the ability to interface with different partners on areas of common interest is essential.

Alongside the visitor economy recovery plan sit a number of county-wide strategies that touch the visitor economy tangentially or are closely interwoven with it[1]. This destination management plan picks up common themes running through those strategies and endorses them, giving them a visitor economy perspective and in some instances translates them into specific visitor economy relevant actions.

- [1] Vibrant Shropshire; Cultural Strategy 2021-31- https://shropshire.gov.uk/vibrant-shropshire/
- Shropshire Hills Sustainable Tourism Strategy 2018-23- https://www.shropshirehillsaonb.co.uk/Documents/Shropshire%20Hills%20Sustainable%20Tourism%20Strategy%202018-2023.pdf
- Shropshire's Great Outdoors Strategy 2018-28- https://shropshire.gov.uk/media/9703/sgo-strategy-final-draft.pdf
- Shropshire's Economic Growth Strategy 2017-21- https://shropshire.gov.uk/media/6087/economic-growth-strategy-for-shropshire-2017-2021.pdf
- Shropshire's Health and Wellbeing Strategy 2021-25- https://shropshire.gov.uk/media/20571/health-and-wellbeing-strategy-2021-2025-draft-ev059.pdf
- Shropshire's Climate Change Strategy- https://shropshire.gov.uk/shropshire-climate-action/what-have-we-achieved/policies-strategies-and-guides/climate-strategy-and-action-plan/

There is a deliberately close alignment between this plan and three existing strategies: The Cultural Strategy (2021-31), The Shropshire Hills Sustainable Tourism Strategy (2018-23) and the Shropshire Great Outdoors Strategy (2018-28). All three have influenced the content of this plan to a significant extent and are reflected in its vision, aims, objectives and priorities. The principles of sustainable development and the need to work in partnership are clearly referenced in the DMP and there is agreement on product gaps for future development as well as the need for better data and intelligence and a more coherent and joined up approach to marketing.

Additionally, the Council's overarching strategic policy approach towards equality, diversity and social inclusion is intrinsically woven into the Council's policy aspirations with regard to economic growth and to the visitor economy. The Council's approach encompasses consideration of ways to maximise positive health and wellbeing impacts for the community and for groupings within the community, whether these are drawn from the nine Protected Characteristic groupings as defined in the Equality Act 2010, or whether there is intersectionality between these groupings eg Age and Disability.

For example, health and wellbeing is connected to enjoyment of the outdoors, access to green spaces and opportunities for exercise, thereby contributing towards mental and physical wellbeing across groupings as well as for those at risk of social exclusion. The DMP's emphasis on protecting and managing landscapes assets and improving accessibility to outdoor spaces will benefit the resident population as much as visitors to the area.

It will thus link into the outcomes set out in the updated Economic Growth Strategy (EGS) for the Council, which is anticipated to contribute towards improving on Shropshire's position as one of the healthiest places to live which will positively influence people's mental and physical wellbeing. This is not least through improving prospects of employment and therefore prosperity across age ranges and for people with disabilities and /or with caring responsibilities, alongside upskilling and further education opportunities as well as potential for greater social mobility across our rural economy.

Equality impact screening carried out in the development of the revised Economic Growth Strategy 2022-2027 (EGS) has indicated that positive impacts would be intended for a variety of intersecting Protected Characteristic groupings as defined by the Equality Act 2010 (Age, Disability, Pregnancy and Maternity, Sex) through future engagement process and through the delivery of specific projects developed within the Action Plan. This would be due to an emphasis within the EGS on developing the County as a better place in which to live, learn, and do business, as well as to access for leisure, environmental and hospitality pursuits and endeavours. Additionally, positive impacts are anticipated to accrue for the tenth grouping of consideration in Shropshire, of Social Inclusion. This is not least due to improvements anticipated for vulnerable individuals and households such as young people leaving care, and veterans and serving members of the armed forces, as well as low-income households, rural households, and people living in fuel poverty.

Furthermore, there is potential for an increase in the positive impact in equality terms from low to positive, for the groupings of Gender Reassignment, Race, Religion and Belief, and Sexual Orientation, if efforts are made to engage with faith communities and LGBT communities and with those undergoing gender reassignment.

There is potential for further positive impacts including stimulation of economic development and investment which will provide jobs and improved workspace. In line with the Public Sector Equality Duty on the Council, as set out in the Equality Act 2010, the Council will need to ensure that contractors engaged in commercial development are likewise able to demonstrate compliance with PSED duties. In so doing, they will also be expected to adhere to guidance with regard to equity of access to economic opportunities.

The DMP, as an integral policy component of the overall approach of the Council towards economic growth, sees the Council as an enabler in this regard rather than as a direct provider of a service. This will nevertheless find the Council continuing to hold a watching brief, much as happens already with national and regional policy, in order that we may seek to ensure that consideration is maintained and due regard given to equality impacts for and across groupings as the DMP progresses. The need to work with regional partners to leverage resource which will then lead to positive equality impacts as well as positive economic impacts is a common denominator across strategic documentation. For example, the revised EGS and the DMP both highlight digital connectivity and transport infrastructure as priorities for economic success, with the DMP providing practical sectoral actions

4.The vision for Shropshire as a visitor destination

The word cloud above represents the aspirations of stakeholders involved in the creation of this plan. Of foremost importance are sustainability and the quality of the welcome[2]. Equally important is a recognition that both physical and digital connectivity across Shropshire for visitors and businesses need addressing. However, this latter is more of a "levelling up" imperative than a visionary one. Also, what is striking is that apart from these attributes there is no clear direction of travel for the future. Yet in our post Covid world what people are looking for is subtly changing and Shropshire has a lot to offer:

- natural tourism – the beauty and unique geology of the Shropshire landscapes cannot be disputed

- tourism around the history of civilizations and ideas – from prehistoric to Romans, a series of world changing and iconic people and places – Darwin and Owen, Ironbridge, and Flax Mill – and a myriad of unusual and fascinating tales to tell – Jack Mytton, Cadfael, the Olympic Games

- a collection of architecturally interesting towns each with distinctive character and in many cases quirky personalities

If we combine these with ambitions of sustainability and welcome, we can create a vision that is motivating, distinctive and true to the place.

[2] Welcome is an important aspect of a destination – before it was capital of culture in 2009 Liverpool's reputation was unfriendly bordering on aggressive, after it was perceived as the most welcoming city in England

Shropshire will be a sustainably managed destination that welcomes the curious and the adventurous to explore its outstandingly beautiful natural landscapes and internationally recognised built heritage in a way that safeguards these precious assets now and for future generations.

It is a place where world-changing ideas were born and are celebrated, and it continues to display a refreshing independence of thought and spirit.

Its market towns and villages are alive with artisan producers, cultural practitioners and hospitality businesses that combine to create a quality environment in which visitors and residents alike are able to rethink, refresh and recharge.

With such a vision for the future should come a shared narrative about what sort of place Shropshire is and some clear objectives that will help to deliver it for visitors:

Objective 1:

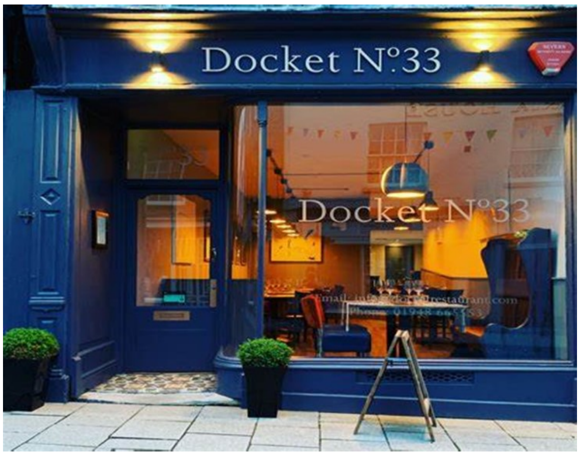
That by 2025 the public, private and voluntary and community sectors across Shropshire will be working together (One Shropshire) to deliver a coherent, quality visitor and resident experience that a) focuses on those aspects of its visitor offer that differentiates Shropshire from other rural destinations b) addresses both physical and digital connectivity in a sustainable way and have communicated it well to visitors and c) is organised in a way that maximises public and private skills and capacities and encourages business engagement

Objective 2:

That by 2025 GVA growth will be a minimum of 5% per annum and that this will have been achieved by adopting a sustainable model of development (VERB see below on page nine) that includes longer stays, value over volume, addressing seasonality and adopting an attract and disperse model of marketing that showcases more of Shropshire to new audiences with a value set that matches that of the county's stakeholders and communities.

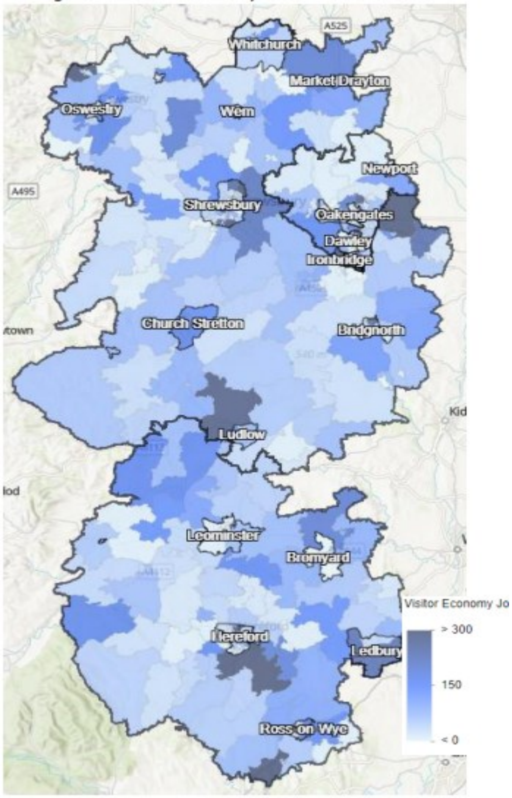
Objective 3

That by 2025, if not earlier, Shropshire will be a destination that can leverage resources and is worthy of consideration for any future tourism funding initiatives because it is well organised, internally joined up and engaged with external partners including adjacent destinations, the WMCA, Visit England, regional airports and transport providers.



5.The value of the visitor economy

Figure 4: Visitor Economy Jobs in the Marches



Source: ONS Business Register & Employment Survey

Tourism is a key economic, social, and cultural asset. Before Covid the UK was the 5^{th} biggest tourism market in the world. The sector is a major contributor to jobs and growth in the UK, indirectly employing 4 million people and making a direct economic contribution of £75 billion a year pre-pandemic.

It is also an important sector in Shropshire. According to the ONS Business Register & Employment Survey in 2020 there were estimated to be 1340 businesses and 12200 employees in the sector in Shropshire. According to ONS Regional Gross Value Added, the contribution to the GVA of Shropshire was in 2019 estimated to be £282m and the rate of year-on-year increase was estimated to be around 7%.

Across the Marches area there are several places in Shropshire where tourism accounts for a significant percentage of jobs – Shrewsbury, Ironbridge, Church Stretton, Ludlow, Bridgnorth and Bishops Castle. During Covid the Council noticed an increase in universal credit applications in some of these tourism clusters indicating that tourism activities represent vital secondary sources of income to many people.

When last assessed the total number of trips to Shropshire was 13 million a year with 9 out of 10 being day trips. The average length of stay for overnight trips was 3.2 nights slightly above the national average with the majority being made by UK residents.

As a result of the dominance of the day visit market the contribution of visitors to the economy is lower than in other destinations. The average day visitor spends £24.45 compared to an England average of £34.65 and trip spend is £173 versus £187.

6.Principles for managing Shropshire's visitor economy

Two principles underpin this plan:

Partnership: a visitor economy can only be successful if the public, private and third sectors work both together and with local communities. This is not just because scarce resources demand it but because visitors use a very wide range of services and facilities provided by very many businesses, organisations, and providers and come into contact with very many people who live and work in the area. None can create a good visitor experience on their own. If they do not work together to get the visitor experience right, the result will be a fragmented, inconsistent, and unsatisfactory visit.

Limited resources at the destination level make partnerships at the regional and national level increasingly important. Future government funding initiatives are likely to insist on partnership working. It is also likely that funding will be given to those who present a single point of contact across the widest geography that makes sense to consumers and avoids confusing them. Key partnerships for the county are: The Marches LEP area including Herefordshire, the West Midlands, VisitEngland as the national strategic lead, and VisitBritain, particularly for international opportunities.

Sustainability: the principles of sustainable tourism are important to all places that aspire to attract and welcome visitors, but they are particularly relevant in a county where the natural landscapes and built heritage are central to the visitor offer. Growth which damages the central product or affects residents' quality of life or costs more than it contributes will erode the visitor offer, undermine the visitor experience and adversely affect those who live, work, invest and run businesses in Shropshire.

Sustainable tourism, or 'wise growth' as it is sometimes known, uses a framework known as VERB. This ensures that development is balanced between the needs of the **V**isitor, the **E**nvironment, **R**esidents and **B**usinesses. Concepts of accessibility and inclusion are inherent in achieving this balance.

These principles have influenced the priorities and actions in this plan to a considerable degree and should be integral to any future thinking or plans for visitor economy development and promotion.

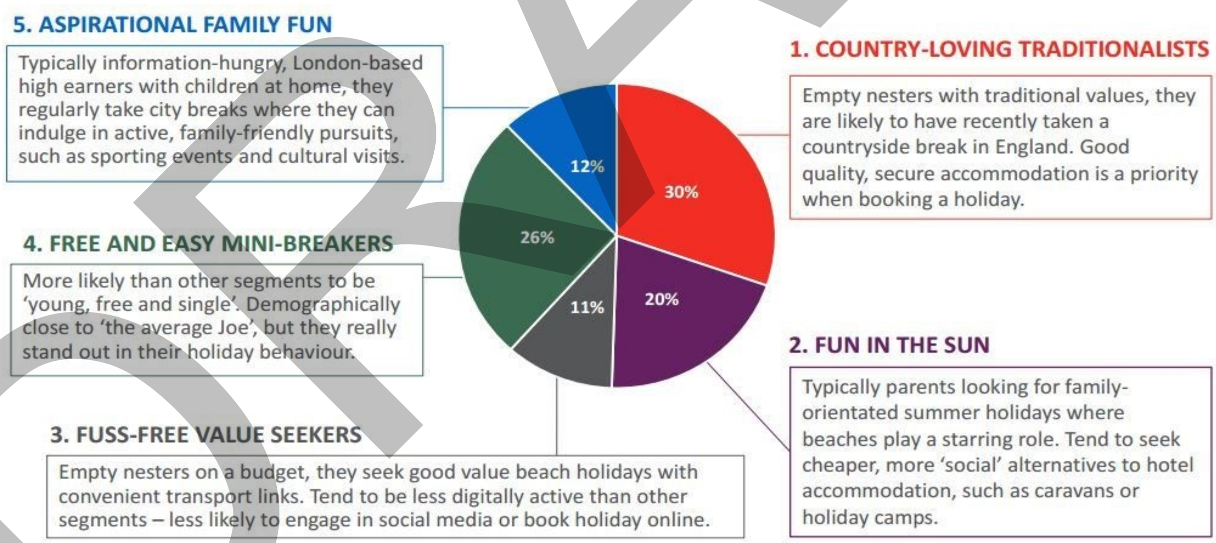
7.Target markets and visitor segments

Covid may well have changed the way visitors choose and evaluate a destination, only time will tell.

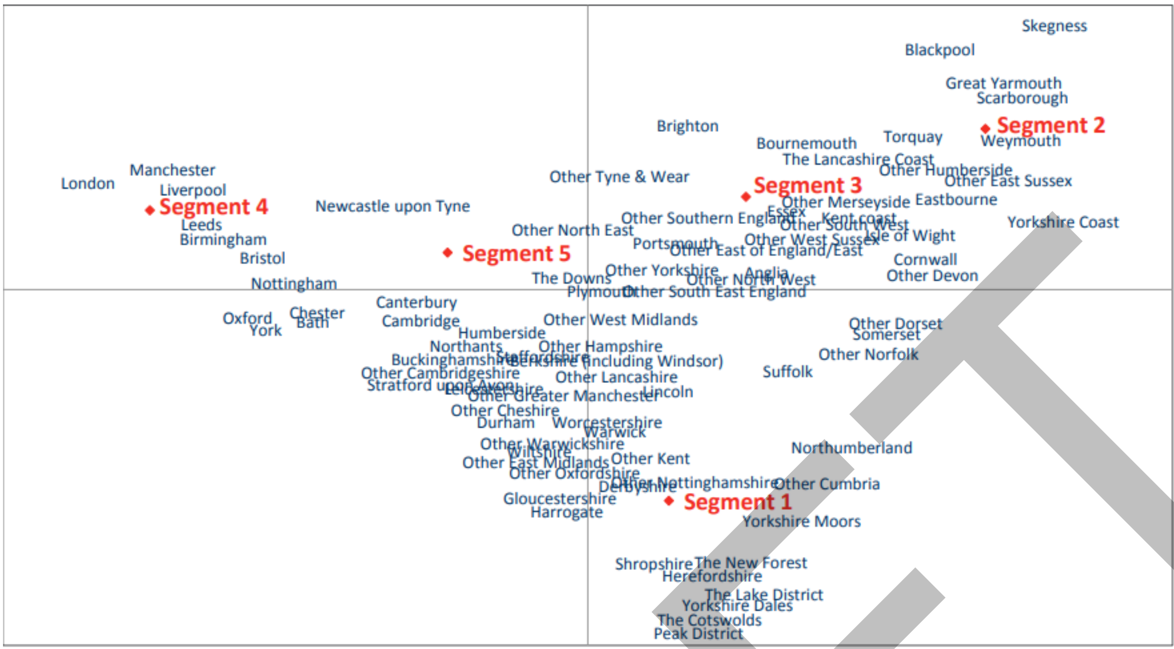
There is evidence that destinations that were previously out of favour have been reappraised by visitors who are looking for uncrowded places that offer something different and promote their health and wellbeing. We have also seen big increases in the number of visitors who prioritise “green” travel and who are looking for more authentic experiences especially in areas such as food and drink, crafts and heritage interpretation. On the other hand, people still want good value for money and a sense that wherever they choose to visit there is plenty to do come rain or shine.

By shaping existing and new product around the people who are most likely to buy into the Shropshire offer and informing promotional activity around their motivations and interests, Shropshire stands the best chance of retaining existing visitors and increasing its appeal to those that have not visited before.

Because only anecdotal or geographically limited data exists for Shropshire, priority visitor segments are taken from the well-established Visit England segmentation model.



The chart below makes it clear that Shropshire would have a strong appeal to segment 1 – COUNTRY LOVING TRADITIONALISTS – and virtually zero appeal to segment 2 – FUN IN THE SUN – where a traditional beach experience is axiomatic.



However, it does point to other segments that Shropshire can attract. If Segment 4 – FREE AND EASY MINI-BREAKERS - likes Chester, then there is a good chance they will also like Shrewsbury. By focussing on family outdoor activities Shropshire might even be able to develop a following among Segment 5 – ASPIRATIONAL FAMILY FUN. A clear focus on developing product and experiences for these segments will help Shropshire to broaden its appeal.

In term of markets Shropshire is fortunate in having large population centres within a comfortable travel time for both day and staying visits, with good road and rail links into the county. All studies to date, including the Arkenford segmentation (2012) and the Marches tourism strategy conclude that the areas of greatest potential for Shropshire are local and regional, including the large population centres of Greater Manchester, Merseyside and the Birmingham conurbation as well as Wales. This has been confirmed by stakeholders with the Southeast of England also recognised as a potential source market.

At this point international visitors will be challenging to reach and are not a priority though there is some potential around international business visits to Telford.

8.Priorities 2023-2025

Eight priorities have been identified as important for Shropshire’s future success. They are interdependent and success depends on making progress on each priority.

(1) Develop a strong evidence base to support future decision making
Shropshire lacks comprehensive and up to date information about the performance of the destination. Consequently, it is difficult to quantify the contribution the visitor economy makes towards economic, social, and environmental health or population health or identify actions that will make a positive difference. The situation is remedied by putting in place a programme of primary research which will establish baselines, provide insight and track trends over time. Agreeing at the outset the performance measures that go beyond economic growth against which success will be measured is critical.

(2) Improve digital infrastructure for tourism businesses
Visitors expect to be able to source ideas, inspiration and information from online sources, book a trip in advance and use smart phones for post arrival exploration. Upgrading digital infrastructure, particularly broadband coverage, and supporting the digital capabilities of tourism businesses will help meet these expectations.

(3) Increase the appeal of the county for visiting families
A cluster of attractions centred around Ironbridge and Telford draw families to the county but family friendly product that would appeal to aspirational families across the region is underdeveloped. A proactive approach is needed to develop existing and new family-oriented attractions and experiences, including festival and events and activities.

(4) Adjust the ratio between day and staying visitors from 90:10 to 80:20
Staying visitors are beneficial to destinations because they have a lower impact on infrastructure and contribute more to the local economy. Shropshire has an exceedingly high number of day compared to staying visitors. Adjusting the balance will be achieved by growing accommodation stock in all segments from budget to premium, branded to independent boutique, and highlighting the offer through itinerary development and packaging.

(5) Become an exemplar destination for sustainable tourism practice
Two of the county’s main assets are its rural offer, with one third of Shropshire designated an Area of Outstanding Natural Beauty, and its built heritage, with parts of two World Heritage Sites in the county. These assets experience some of the highest visitor numbers putting pressure on the landscape and infrastructure. Embedding sustainability principles into tourism development will ensure central assets remain available to visitors for decades to come.

Supporting businesses to adopt sustainable business practices will make them more attractive to visitors with an environment conscience and burnish Shropshire’s credentials as an environmentally responsible destination. Accessibility to tourism facilities, products and services is a central part of a responsible and sustainable approach to tourism (UNWTO).

(6) ***Adopt an attract and disperse approach to regional and national marketing.***
The pattern of visitation across the county is uneven. It is important to ease pressure on over visited areas and ensure the benefits of tourism are felt across the county. Using an “attract and disperse” approach to marketing, pre and post arrival, and by paying attention to the effectiveness of gateways and dispersal points, will help attract more visits, introduce visitors to the full breadth and depth of the offer and help to spread the impact of visitors across the county.

(7) ***Increase Shropshire’s reputation for quality experiences by developing the product.***
Ludlow has a national reputation for food and drink built on past success but in recent years the breadth and quality of the offer has declined. The county also has an emerging reputation for soft leisure – walking, cycling, nature watching – based on the Shropshire Hills, the Wrekin and the Borderland. Indoor options should not be forgotten with careful curation of cultural products that have the power to excite visitors and counter seasonality issues associated with countryside destinations.

(8) ***Build a reputation for delivering high service standards and a warm visitor welcome by investing in people.***
Service and welcome can make or break a visit: when they are good, they result in word-of-mouth recommendation and customer loyalty; when they are poor the destination’s reputation suffers and disappointed visitors discourage others from trying somewhere new. Shropshire will take a fresh look at welcome and service standards and take steps to ensure both meet high customer expectations that are driven by worldwide travel experiences.

1. Actions 2023-25

Priority	Rationale	Actions
1 Develop a robust evidence base to support future decision making	Knowledge helps everyone to plan effectively and deliver a positive outcome. Baselines are needed to set targets while tracking performance over time means that progress can be evaluated, and activity adjusted as circumstances change.	Conduct a county-wide visitor survey
		Agree metrics for how future success will be evaluated
		Establish baselines for each metric and set targets
		Audit product, business base and assets and update lists annually
		Identify existing sources of visitor data and information, bring it together and extract insights that can be shared widely so that all partners share the same level of understanding
		Develop profiles for each target audience and communicate them to all stakeholders
2. Improve digital infrastructure for tourism businesses and visitors	Consumers expect to be able to source information online, book elements of a trip online and use smart devices to navigate destinations post arrival. They want information to be easy to access and simple to use. Shropshire must meet these expectations or visitors may choose to go elsewhere.	Create a map that shows areas with significant visitor product /high visitor numbers but poor digital connectivity (broadband) and lobby for improvements
		Develop and deliver a digital capacity building programme/training for visitor economy businesses

3. Increase the appeal of the county for visiting families	There is a strong cluster of family friendly attractions in northeast Shropshire and Telford and a smattering across the county, but more is needed. Families are a target segment with several source markets close by: Liverpool, Greater Manchester, Birmingham.	Existing attractions to develop their family offer using case studies and examples of best practice.
		Identify appropriate sites for new on-brand development, and proactively engage with existing attraction operators looking to expand into new areas.
4. Adjust the ratio between day and staying visitors from 90:10 to 80:20	Staying visitors have a higher value than day visitors, they are also more sustainable in environmental terms. Higher spend means higher revenue and profit which businesses can reinvest, creating better quality experiences for visitors and more jobs for local people.	Develop 1- or 2-day on brand events with national pulling power (grow existing or develop new).
		Commission a study into accommodation provision and identify gaps relevant to target visitor segments.
		Identify appropriate sites for new development, and proactively engage with potential investors to grow the accommodation stock.
		Develop and promote inspirational county-wide itineraries based on product strengths.
		Audit accommodation providers and attractions to identify those that are trade ready.
		Work with the UK travel trade (tour operators, travel agents) to develop overnight Shropshire packages.

5. Become an exemplar destination for sustainable tourism practice	People are increasingly making decisions based on values such as minimising their impact on the environment and benefiting the communities they visit. For a destination with significant rural assets and world-class built heritage a sustainable approach to planning and development which protects and conserves the assets that draw visitors to the area makes sense. Accessibility to tourism facilities, products and services is a central element of a responsible and sustainable approach to tourism (UNWTO)	Develop visitor friendly public transport options that connect the county's main visitor attractions (especially car only areas) to its gateways and main visitor centres
		Develop visitor friendly information and payment methods for the county's bus network.
		Increase the number of EV charging points across the county, particularly outside the main towns.
		Ensure that parking information that offers viable alternatives to the car post arrival is widely available.
		Review Park and Ride provision from the visitor perspective and make changes as needed e.g., frequency, operating hours, information, sites.
		Source or create audit-style data on existing sustainable business practice.
		Clarify the most relevant sustainability practises for tourism businesses.
		Clarify sustainability measures that influence consumer choice.
		Create and implement a B2B campaign highlighting the benefits of sustainable business practice.

		Design and deliver an environmental efficiency programme for visitor economy businesses.
		Work with leaders in the field of accessible tourism e.g. Visit England and Tourism for All, to develop a plan to improve accessibility provision.
		Promote the use of accessibility statements across visitor economy businesses.
6. Adopt an attract and disperse approach to regional and national marketing.	Putting hero products/destinations front and centre of marketing campaigns will help Shropshire be seen amongst stiff domestic and international competition. Once the visitor is interested, showcasing the full breadth and depth of the Shropshire's offer will turn interest into a visit and spread visitor economy benefits across the county. Post arrival mechanisms and good gateways can help deliver an attract and disperse approach.	Develop a strategic marketing group to develop and deliver county-wide regional, and in time national, marketing campaigns.
		Create a digital information plan to bring together, curate and streamline information about the county for visitors from awareness and inspiration through to planning, booking and visiting.
		Create an annual content calendar for use by all stakeholders to coordinate marketing activity county-wide.
		Maintain and regularly replenish a repository of marketing content and assets for use by all stakeholders and businesses.
		Increase the amount of Shropshire content on online tour operator (OTA) platforms.
		Ensure key gateways in the county adopt mechanisms to disperse visitors across the

		county including through good information provision.
7. Increase Shropshire's reputation for quality experiences by developing the product.	It is important to continually refresh the offer for visitors to meet constantly rising expectations and provide reasons to visit again. New product helps add breadth and depth to the destination offer and widen the destination appeal to new audiences.	Audit infrastructure for walkers and cyclists, identify gaps in provision and develop a plan for development and improvement.
		Develop a programme of activity to develop the food and drink offer of the county including bring Ludlow's food offer back to full strength: including supplier/retailer networking, food-stories and ambassadors, food and drink retailing, local sourcing.
		Select one product area that has potential to become a strong proposition county-wide and matches the interests of priority visitor segments and create a plan to support its development. Choose from: water-based experiences, nature watching, craft, outdoor adrenalin.
8. Build a reputation for delivering high service standards and a warm visitor welcome by investing in people.	Shropshire must meet customer expectations of service and welcome to encourage repeat visits, boost its reputation, and generate word of mouth marketing, particularly on social channels.	Create and deliver a Shropshire wide ambassadors scheme based on the Oswestry Borderlands/Welsh initiative
		Scope the feasibility of a Shropshire excellence brand for service standards and develop an associated programme of activity
		Engage and motivate the 18-30 workforce to consider tourism and hospitality as a work and career choice

Appendix A: Product Strengths and Gaps

Almost a quarter of Shropshire is an Area of Outstanding Natural Beauty. There are 3 National Nature Reserves, over 50 Forestry Commission sites, 80kms of canals and waterways and 14 internationally important wetland sites. The rights of way network is the third largest in the country although promoted routes for walking and cycling are concentrated in the south and west of the county.

Shropshire has 17 market towns. The most prominent in terms of tourism are the county town of Shrewsbury, Ludlow known nationally for its food festival, Oswestry to the northwest, Church Stretton, an important hub for the Shropshire Hills, and Bridgnorth near Ironbridge Gorge. The rest are scattered throughout the county.

Heritage is a product strength with 2 world heritage sites in or partly in the county. The National Trust has five properties in the county, including Attingham Park and Dudmaston Hall and English Heritage looks after 15 properties including castles, priories, and abbeys. The cultural offer comprises the nationally significant collection of museums managed by the Ironbridge Gorge Museum Trust plus the county Museum and Art Gallery in Shrewsbury, those housed in heritage properties such as Shrewsbury and Ludlow Castles and attached to heritage attractions. Most of the market towns have a heritage centre or local museum.

Food and drink is more independent in nature than in some comparable areas of the country and is particularly notable in Shrewsbury and Ludlow. Retail comprises the commonly found high street names, particularly in Shrewsbury and Telford, alongside a good range of independents in Shrewsbury and market towns of Oswestry and Ludlow, particularly women’s fashion, house and home, crafts and makers and antiques.

For a rural county, the garden product is relatively underdeveloped compared to Herefordshire for example, with around seven gardens of particular note. Most are attached to a historic house. Countryside activities are well represented and include fishing (day tickets available), golf (around 25 courses), equestrian centres and guided hikes in the most popular spots such as the Wrekin and the Shropshire Hills. Family attractions are under-represented compared to other rural counties with a cluster around Telford plus a couple of falconry centres and farm attractions. Ironbridge and the two heritage railways also have clear family appeal. Family activities are represented with a sizeable number of water sports hire companies for canoeing and paddleboarding, several boat trips and a couple of balloon flight companies.

Festivals and events that have a regional or national reputation include the Shropshire Folk Festival and the Ludlow Food Festival. There are many smaller local events arranged around the main school and annual holiday periods such as Oswestry Balloon Carnival, Shrewsbury Food Festival, Market Drayton winter fair or the Clun Man Festival.

The accommodation sector reflects a similar picture to that across many rural English Counties with a concentration of hotels, B&Bs and guesthouse accommodation around the county town and the larger market towns including around 12 boutique style properties plus around 12 country house hotels some with spa facilities. The county is underrepresented in the portfolios of the major branded hotels with just a handful present such as Macdonald and Mercure. Telford has a more developed branded hotel offer due its conference market. Budget provision is focused on Shrewsbury and the main visitor hot spots with Travel Lodge and Premier Inn having the largest footprint. There are gaps in provision in some of the visitor hotspots including the Shropshire Hills and few providers of alternative accommodation options such as yurts, tepees, and shepherd's huts.

PRODUCT BREAKDOWN

Accommodation serviced

- Hotels – 50, of which circa 12 are country house hotels, 7 Premier Inns, 7 Travelodges, 2 Holiday Inns
- Guesthouses and B&Bs – 100
- Inns with rooms – 20
- 4095 bedspaces in total

Accommodation self-catering

- Campsites and Caravan parks – between 36-50
- Self-catering (including holiday lets) – circa 235
- 2050 self-catered bedspaces in total

Activities and sports

2 Balloon flight providers

- 3 Boat Trip companies
- 9 water sports hire companies (canoes, paddle board, rafts)
- Long Mynd Gliding Club
- Hawkstone Park (Championship)
- Humphrey Kynaston Way – riding and cycling route
- Jack Mytton Way – riding and cycling route
- Lilleshall National Sports Centre
- Ludlow Racecourse
- Shrewsbury Town Football Club
- Telford Snowboard and Ski Centre

Attractions - culture

- Bishop's Castle Railway Museum
- Cambrian Heritage Railways & Museum
- Coleham Pumping Station
- Daniels Mill, Bridgnorth

- Northgate Museum, Bridgnorth
- Ironbridge Gorge Museums Trust including Coalbrookdale Museum, Darby Houses, Coalport China Museum, Jackfield Tile Museum, Museum of the Gorge, Enginuity, Blists Hill, Broseley Pipeworks, Tar Tunnel, Ironbridge Open Air Museum of Steel Sculpture
- Land of Lost Content Museum
- Ludlow Museum
- Market Drayton Museum
- Much Wenlock Museum
- Old Market Hall Cinema and Cafe
- Oswestry Town Museum
- Rowley's House and Mansion
- Royal Airforce Museum, Cosford
- Shrewsbury Flaxmill Maltings Visitor Centre (opening 2022)
- Shrewsbury Museum & Art Gallery
- Soldiers of Shropshire Museum, Shrewsbury Castle
- The Engine House, Severn Valley Railway
- The House of Crutches Museum, Bishop's Castle
- Theatre Severn

<u>Attractions – family</u>

- Acton Scott Historic Working Farm
- Hoo Zoo and Dinosaur World
- Exotic Zoo

<u>Attractions – heritage</u>

- Acton Burnell Castle (EH)
- Attingham Park (NT)
- Boscobel House and the Royal Oak (EH)
- Bridgnorth Cliff Railway
- British Ironworks Centre
- Buildwas Abbey (EH)
- Cantlop Bridge (EH)
- Clun Castle (EH)
- Dudmaston Hall (NT)
- Haughmond Abbey (EH)
- Ironbridge Gorge (WHS)
- Langley Chapel (EH)
- Lilleshall Abbey (EH)
- Ludlow Castle
- Mitchell's Ford Stone Circle (EH)
- Morton Corbet Castle (EH)
- Morville Hall (NT)
- Old Oswestry Hill Fort (EH)
- Pontcysyllte Aqueduct and Canal (WHS)
- Severn Valley Railway
- Shrewsbury Abbey
- Shrewsbury Castle
- Shrewsbury Cathedral
- Stokesay Castle (EH)
- Sunnycroft (NT)
- Telford Steam Railway
- Wenlock Priory (EH)
- Weston Park
- White Ladies Priory (EH)
- Whittington Castle
- Wilderhope Manor (NT)
- Wroxeter Roman City (EH)

Hospitality

- 19 AA rosette restaurants, 3 with 3 rosettes
- 10 Michelin Guide restaurants
- 16 pubs recommended in the Good Pub Guide
- 435 restaurants in total
- 350 cafes and pubs in total

Landscapes, gardens, countryside

- Abbey Gardens
- Attingham Park (NT)
- Bridgnorth Castle and Grounds
- Carding Mill Valley and the Long Mynd (NT)
- Fenn's, Whixall and Bettisfield Mosses National Nature Reserve (NE)
- Hawkstone Park Follies
- Hodnet Hall Gardens
- Llangollen Canal
- Montgomery Canal
- Offa's Dyke Path National Trail
- Oteley Gardens
- Park Hall Farm
- Stiperstones National Nature Reserve
- Severn Valley Country Park
- Shropshire Hills AONB
- Shropshire Union Canal
- The Mere at Ellesmere (SC)
- The Quarry (STC)
- The Shropshire Way – walking route
- Walcot Hall and Gardens
- Wem Moss National Nature Reserve (NE)

Major events and festivals

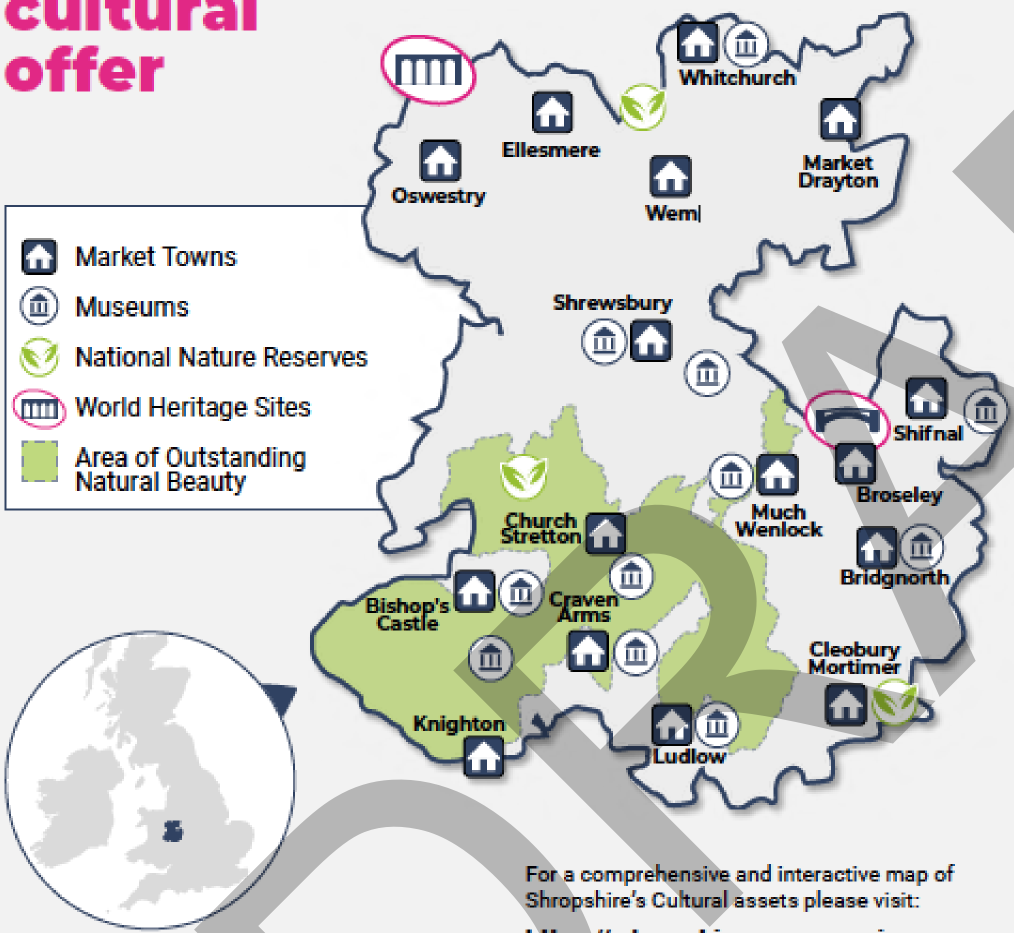
- Ludlow Food Festival – September
- Oswestry Balloon Carnival
- Shrewsbury Flower Show
- Shrewsbury Folk Festival
- Shropshire Kids Fest
- Shropshire Oktober Fest

Visitor facilities

- Bridgnorth Library & Visitor Information Point
- Church Stretton Visitor Information Centre
- Ironbridge Visitor Information Centre and gift shop
- Ludlow Visitor Information Centre
- Much Wenlock Visitor Information Centre
- Oswestry Tourist Information Centre
- Shrewsbury Visitor Information Centre
- Shropshire Hills Discovery Centre

These listings are a snapshot of the product offer in Shropshire. It is not a comprehensive audit and there may be in advertent omissions. Its purpose it to provide a general overview of the Shropshire offer to visitors.

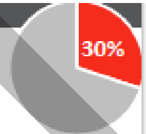
Shropshire's cultural offer



For a comprehensive and interactive map of Shropshire's Cultural assets please visit:

https:// shropshire.maps.arcgis.com

Appendix B: Visitor Segments (Source: Visit England)



#1 Country-loving traditionalists

Typically empty nesters with traditional values, country-loving traditionalists have a moderate household income, but fewer family members to cater for when on holiday. This means that their budget stretches further, and good quality, secure accommodation is a priority when booking a holiday. They are likely to have recently taken a countryside break and keep up to date with UK tourism through websites such as English Heritage and the National Trust.

INCOME

AVERAGE

No skews to average income – 51% in the £20K-£45K HH income bracket

LIFESTAGE

Married/living with partner (73%) with no children (81%). Nearly half are aged 55+

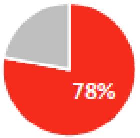
LIVE

More likely to live in East/Anglia and South East (29%, Index*: 108)

MEDIA

Higher than average consumption of broadsheets (27%) and UK tourism websites (15%)

ENGLAND TOURISM



Visited England in the last 12 months

2.3 holidays a year (typical share of holiday type)

ON THEIR MOST RECENT TRIP...

Typically a countryside break (64%) for two (58%)

59% didn't stay in a hotel, being more likely than other segments to prefer the 'personal touch' of a b&b or rented accommodation

54%

Booked directly through the accommodation provider, not an intermediary

Spent time exploring the countryside (65%) and/or small towns (57%)

TOP PRIORITIES IN CHOOSING A HOLIDAY

IMPORTANCE	% T2B	Index*
Unspoilt countryside	79%	105
Clean and tidy environment	77%	104
Opportunities to eat/drink local food/produce	63%	104

ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

	Index* of mean score**
Offers a wealth of cultural experiences	110
Makes you feel connected to the country's history and heritage	109
Has beautiful countryside	109
Is an ideal place for people like me	109

*Index is a measure of skew the % divided by the average, with 100 being the average.
↑shows higher than average statistic

27

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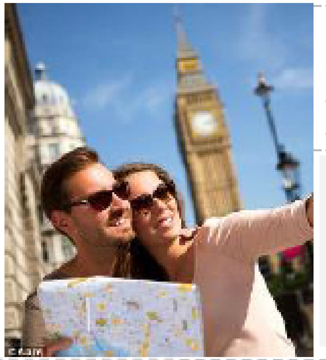
VisitEngland

#4 Free and easy mini-breakers



Typically more likely than other segments to be young, free and single, free and easy mini-breakers have an average household income; however they are able to indulge in a wealth of activities when on holiday, possibly due to their lack of children. This segment is demographically close to 'the average Joe' (with few skews), but it is in their holiday behaviour that they really stand out from other segments.

INCOME

AVERAGE

43% in the £20K-£45K HH income bracket; some high earners (1 in 4 earning £45k+)

LIFESTAGE

Segment most likely to be single (38%), no kids (83%) and aged under 55 (70%)

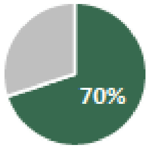
LIVE

More likely to live in the North (East or West) – 21%, (Index* 113)

MEDIA

Higher than average consumption of broadsheets (24%) and strong users of social media (66%)

ENGLAND TOURISM



Visited England in L12M

2.1 holidays a year.

Skew towards taking a short break (↑ 66% share of holidays)

ON THEIR MOST RECENT TRIP...

Most likely to be a city break (73%) for two (59%) over 1-3 nights (87%)

71% stayed in a hotel, with B&Bs the only alternative considered (19%)

71%

Chose to book their accommodation online; along with segment #5, the segment most likely to do so

More likely than others to shop (57%), explore the city (55%), visit a museum or gallery (31%) and/or indulge in cultural entertainment (29%)

TOP PRIORITIES IN CHOOSING A HOLIDAY

	% T2B importance	Index*
A destination that is easy to get to by public transport	46%	122
Easy to get around by public transport	50%	120
Availability of festivals, music, sporting and cultural events	39%	111

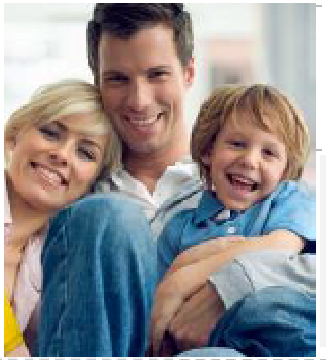
ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

	Mean score**
Has beautiful countryside	1.39
Has interesting towns and cities	1.31
Is easy to get to	1.26

*Index is a measure of skew the % divided by the average, with 100 being the average.
**Mean score based on +2 strongly agree through -2 strongly disagree
↑ shows higher than average statistic

30

#5 Aspirational family fun



Typically London-based high earners with children at home, this segment regularly takes city breaks where they can indulge in active, family-friendly pursuits, such as sporting events and cultural visits. They are information hungry: avidly consuming mainstream media (especially newspapers), active on social media, and actively browsing holiday booking websites to evaluate and book their holiday accommodation.

INCOME

HIGHER

Skew much higher incomes.
- 67% with HH income £35K+ (45% over £45K)

LIFESTAGE

Tend to be male (57%) and aged under 50 (92%). Segment most likely to have children (62%)

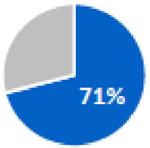
LIVE

Much more likely to live in LONDON (26%, index*: 174)

MEDIA

Highest consumption of broadsheets (31%) and free newspapers (18%). Visit UK tourism websites (15%)

ENGLAND TOURISM



Visited England in L12M

↑ 2.7 holidays a year

More likely to take a longer holiday than other segments (↑ 18% share of holiday type)

ON THEIR MOST RECENT TRIP…

Typically a city break (45%) for at least 3 people (55%)

54% stayed in a hotel, with 1 in 5 opting for a b&b instead

34%

Chose the convenience of booking through an aggregator website, the segment most likely to do so

More likely than others to spend time at a theme park (22%), zoo/ aquarium (20%) and/or sporting event (12%)

TOP PRIORITIES IN CHOOSING A HOLIDAY

	% T2B importance	Index*
Good nightlife	49%	148↑
Availability of festivals, music, sporting and cultural events	51%	144↑
Good range of water-based/beach activities	50%	131↑

ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

	Index* of mean score**
Offers great entertainment / nightlife	116↑
Makes me feel like I'm doing less harm to the environment	121↑

*Index is a measure of skew the % divided by the average, with 100 being the average.
↑shows higher than average statistic

31

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VisitEngland

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Appendix C: Developing Shropshire's Destination Management Plan

The work to produce this plan involved twenty four 1-1 interviews, two days of stakeholder workshops, an online industry survey that elicited 121 responses, a stakeholder seminar, a desk review of national, regional and local policies and plans and a comprehensive analysis of county plans covering the economy, outdoor spaces and cultural provision.

People who gave time and actively participated include:

Paula Armstrong, Wellington Town Council
Professor Mark Barrow, Shropshire Council
Mark Bebb, Salop Leisure
Sarah Bird Telford and Wrekin Council
Marianne Blaauboer, Flaxmill Maltings/Visit Shropshire
Charlotte Cain, Telford and Wrekin Council
Dave Crane, Marches Forward CIC
Tracey Darke, Shropshire Council
Kay and Chris Dartnell, Wheely Wonderful Cycling
Cllr Sheila Davis, Church Stretton Town Council
Tish Dockerty, Love Ludlow
Clare Featherstone, Shropshire Council
Sue Finnigan, Shropshire Council
Allan Forest, Pontcysyllte Aqueduct and Canal
Andrea Fox, Shropshire Council
Edward Goddard, Morris Leisure
Paul Gossage Shropshire Council
Marcus Halliwell, National Trust
Martin Haycock, Tour Guide/Visit Shropshire
Beth Heath, Shropshire Festivals/Visit Shropshire
Phil Holden, Shropshire Hills AONB
Mark Hooper, Visit Shropshire
Psyche Hudson, Telford and Wrekin Council
Victoria Ketcher, Ludlow Farm Shop
Nicola Lewis-Smith, Canal and Rivers Trust
Lee Lucks, Oswestry Borderland Tourism/Visit Shropshire
Nigel MacDonald, Shropshire Hills AONB
Tony Morris-Eyton, High Sherriff/Savile's Estate Agent
Cllr Cecilia Motley, Shropshire Council
Adele Nightingale, Oswestry Business Improvement District
Cllr Lezley Picton, Shropshire Council
Matt Potts, Shropshire Council
Nick Ralls, Ironbridge Gorge Museum Trust
Laura Penman, Fishmore Hall
Richard Powell, Park Hall Farm/Visit Shropshire
Seb Slater, Shrewsbury Business Improvement District
Sally Themans, Love Bridgnorth
Jane Trethewey, Shropshire Council
Bob Welch, Church Stretton Town Council

121 people responded to an online survey that asked about how tourism should be managed in Shropshire. Many answers included information that has been used in creating the DMP. The breakdown of respondents by sector is:
Accommodation providers 23%
Attractions 5.7%
Environment/conservation 8.2%
Heritage 7.4%
Local government (County Council/Town Council/Parish Council) 19.8%
Marketing 7.4%
Hospitality 13.2%
Business Improvement District Companies 1.6%
Retail 9.9%
Culture 4.9%
Activity provider/guides 4.1%
Other 19.8%

Responses were countywide