DESTINATION STAFFORDSHIRE
TOURISM REVIEW, STRATEGY
AND ACTION PLAN
2011-2014

Creating Tourism Success for Staffordshire in Challenging Times

May 2011

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"Nothing ... will ever be attempted, if all possible objections must be first overcome."

Dr Samuel Johnson
Rasselas
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EXECUTIVE SUMMARY

The Destination Management Partnership (DMP) for the county of Staffordshire, including Stoke-on-Trent, was set up as a public/private sector partnership in late 2004 and formally launched in 2007 as a ‘mini tourist board’. It currently describes itself thus:

**Destination Staffordshire** is a dynamic partnership of visitor attractions, accommodation, eating establishments, tourism businesses and local authorities that are working together to drive tourism in Staffordshire. **Our aim is simple.** To use the collective strengths of all involved in Staffordshire to attract more customers into the county, keep them here longer and provide the highest standards of customer care while they’re here.

It has been funded to date mainly by Staffordshire County Council with contributions from tourism partners including Alton Towers, as well as Staffordshire districts and also Advantage West Midlands (through its DMP underpinning programme 2008-2011) together with specific help for rural tourism from the Rural Development Programme for England (RDPE). The DMP operates an active marketing programme but also supports research, business support, training, business tourism, travel trade, Taste of Staffordshire and has championed the development of the newly launched Staffordshire Environmental Quality Mark (SEQM) working through its ‘green tourism’ group. Membership of the DMP was initially free of charge but since 2009 a membership fee has applied. In 2010 with the background of a new Government, the dismantling of the English Regional Development Agencies and many other organisations relevant to the visitor economy, national tourism trends and change, reduced funding nationally and locally, and the emergence of Local Enterprise Partnerships, Destination Staffordshire decided to review its performance and priorities and refocus its strategy and actions. The brief also requested consideration of any specialist or specific/niche market opportunities or gaps for the DMP and to liaise closely with the production of the **Staffordshire Festivals & Events Strategy** which was being prepared in tandem.

It is important to stress that the resulting strategy is for the DMP itself and not a tourism strategy for the County of Staffordshire, though much of its content may be relevant to such a broader application.

**The Review**

Online and offline reviews of materials and media, performance, economic and socio-demographic data and the DMP’s own research compendium as well as individual attraction data have informed the review process. Forty one-to-one consultations, an e-survey to over 1100 members and non-members
and a stakeholder workshop, elicited a comprehensive and frank assessment of the DMP’s overall performance and a wider understanding of tourism in Staffordshire, its main customer base, their behaviour and spend. Broad consensus was that the organisation is seen as active, hard-working, enthusiastic and well organised:

(i) The DMP is generally doing a good job, largely in all the right activity areas.

(ii) There is some room for improvement, development and refinement in some of these areas and organisation.

(iii) It shouldn’t take on more unless for very compelling reasons but should consolidate and build on what is working well and producing a good return.

Most stakeholders appreciate how it has integrated a good representation of the public and private sector to agree and deliver a range of activity. Private sector respondents welcome the opportunity to explain business issues to and work with the public sector and the public sector appreciates the drive and realism provided by business members. Where there was any criticism it was constructive.

The most important strategic issues for the DMP in the future:

1. The continuing need for political, partner and industry support and commitment, especially a real understanding of the value of the visitor economy to Staffordshire and the added value of the DMP. Integration of effort and ambition and having strong relationships with the Staffordshire LEP are regarded as vital.

2. Better articulating the visitor ‘offer’ of the County (leisure & business) by further refining the brand proposition(s) to extend the personal appeal to more visitors and to those market segments producing most benefit.

3. Marketing from strengths, stress distinctive products, location and brands.

4. Sustaining and strengthening the co-ordination of the DMP to engender real partnership working and strong communications with sector, whilst avoiding bureaucracy.

5. The need to grow membership across the whole county to achieve more balance including small businesses and larger key partners.

6. The need to increase productive and commercial partnerships and generate new income streams including sponsorship and affinity arrangements.

7. Continuation and refinement of high quality research and data collection and use it actively to guide actions that produce most return on investment.
Tourism Review, Strategy and Action Plan for Destination Staffordshire
2011-2014

Key Priorities:
1. Continue and refine effective marketing and PR activities
2. Increase the important staying visitor markets
3. Review Business tourism importance and marketing
4. Demonstrate value for money to local authorities and members
5. Secure new sources of funding and income generation looking at new opportunities
6. Widen and strengthen membership, geographic and sectorally, providing what businesses need and improve communications
7. Adopt “smarter” ways of working which help to maximise reduced funding/avoid duplication

These priorities were then grouped collectively under:

1. Marketing
2. Membership and Communication
3. Partnership and smarter ways of working

A range of specific actions were then prepared under these and tested at the stakeholder workshop, refined and then formed the base for the report’s twenty strategic recommendations within four main work streams:

- Partnership and smarter working
- Marketing and Market Intelligence
- Membership and communications
- Destination and Visitor management

These were then incorporated into a simple action plan, a refocused vision and reshaped delivery structure. The suggested vision and aims are designed to galvanise the DMP itself, its members and potential members to show that the DMP has moved forward in its thinking and understanding of its own business model and the business environment in which it works.

A Vision for the future

By 2014 Destination Staffordshire will be working with all relevant partners impacting on the visitor economy across boundaries and sectors, delivering value and quality through everything it does. It will be enabling all elements of the visitor economy, be they built, natural or cultural heritage, food and drink, attractions and accommodation, transport and infrastructure, to contribute together to the best possible experience for all visitors to Staffordshire. Its membership base will be inclusive of the wider visitor economy and empowered to deliver innovative and effective solutions for its own businesses and thus for
visitors, keeping them for longer, with greater allegiance to the county and spending more in the area overall.

**Overall aim**

To harness the collective strengths of all Staffordshire businesses and organisations across the visitor economy to attract more visitors into and around the county, who will spend more time and money through their enjoyment of unique and compelling experiences and the highest standards of customer service.

**The refocused Key Objectives of the Staffordshire DMP**:

1. To deliver the promise we make in our marketing
2. To attract more visitors by promoting and offering the right products to the right markets
3. To identify the best ways to keep those visitors happy and able to recommend us as a destination
4. To ensure the money they spend is maximized and benefits the local industry and economy
5. To communicate well with our members and partners and sustain a continuing process of improvement, best practice and sustainability

**Summary**

‘Continue and strengthen’ the general direction but ‘refine and improve’ was very much what emerged from the review\(^1\), along with the need to reach out to more businesses at local level and not try to be all things to everyone at a time of pressure on resources. Do less better. Sharpen up research to become consistent and up to date and ensure that all data is robust and watertight. Focus on those actions which produce the best return and concentrate on providing excellence and productive engagement with as many businesses as possible whilst feeling confident that the overall direction remains valid and supported. The review and resulting strategy and action plan thus builds on existing activity and results: it does not seek to change core direction, nor does it assume unrealistic budgets or attainment but instead recommends some incremental changes and improvements, realistic actions and just a very few radical aspirations which would need some further consideration by all partners.

\(^1\) All the documentation, research data, consultations, consultees, e-survey and report etc is contained in the Companion Volume to this report. We recommend readers to read the report in conjunction with those appendices.
1. INTRODUCTION AND CONTEXT FOR THE REVIEW, STRATEGY & ACTION PLAN

Destination Staffordshire is still quite an infant. Destination Management Partnerships (DMPs) in the West Midlands went through a very different gestation from that of the rest of the country in that the Heart of England region came late to the game of creating DMOs or DMPs seriously, with limited hope of drawing down even a small resource from its Regional Development Agency (RDA) Advantage West Midlands (AWM). Elsewhere in the country DMOs had been forming – where they did not already exist – in order to respond to the 2003 change in responsibility for tourism in England from the old Regional Tourist Boards to the RDAs and to the opportunity to take maximum advantage of their largesse, where and if it existed.

There was no agreed template for DMPs and each region took a different route: some, like the North West RDA, appointed tourism-specific staff at an early stage and offered tempting rewards for those who fell into line to a prescribed format and invested seriously in the visitor economy in an integrated way. Others such as the North East, funded area tourism partnerships (ATPs) to deliver activities which also aligned with regeneration agendas. Others, including AWM, at first resisted, then dithered and then finally decided to help DMPs, by which time most other regions had already got their houses in order.

Ironically, however, given the political changes of 2010 and the dismantling of the RDAs, this has had an unexpected ‘silver lining’ for tourism in the Heart of England, ensuring that it was in no way dependent on the RDA for oxygen and thus would have to stand or fall on its own feet. Each DMP in the West Midlands has lost the annual funding of £110,000 maximum which most but not all received from AWM between 2008 and March 2011. The replacement of some RDA activity by the new Local Enterprise Partnerships (LEPs) may offer more local decision-making and influencing opportunity as well as more complexity and less resource. Most of Staffordshire is within the new Stoke-on-Trent and Staffordshire LEP but parts of south and east Staffordshire are also involved with the Birmingham & Solihull LEP. Given all this it is therefore imperative that Destination Staffordshire is truly focused and on the right track. Re-visiting and reviewing its activities and impact to date appeared to be timely and Destination Staffordshire therefore decided to review its activity in autumn 2010 in the light of this shifting

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2 Destination Management (or sometimes Marketing) Organisation is the more traditional acronym
3 With an amount of no more than £110,000 p.a. to be bid for over a 3 year programme of “underpinning” activity
4 The Staffordshire DMP Chair is on the LEP Board
5 Also in the Heart of England, Visit Herefordshire also undertook a review of its activity in 2010
economic and structural environment, including its move within Staffordshire County Council out of Economic Development to Culture and Leisure.

1.1 Destination Management Partnerships and Staffordshire

There is no single template for a DMP, as explained above, although the LGA and Partners for England worked for several years to develop a Destination Management Charter for local authorities and partners to adopt. But the generally accepted professional view is that a destination partnership aims to ‘manage’ the destination in an integrated way such that the visitor is considered and planned for at all stages of development, change and infrastructure across all local authority functions, with silo-free thinking and with private sector partners. It is therefore no great surprise to learn that very few signatories to the Charter were obtained. Visit England and strategic partners are now thinking around how to bring best practice in destination management to bear in the new tourism organisational landscape. Visit England’s new strategic framework and England Marketing Plan commits to working through and with DMOs (stressing Destination Management Organisations rather than Marketing) as its main delivery partners, acknowledging that without them it cannot produce its value-added activity or aim towards its 5% growth aim. This is clearly good news for Staffordshire’s DMP and its own strategic partners.

AWM’s own Tourism Strategy set out the role of a DMP thus, to:

- Improve efficiency and effectiveness
- Add value to existing tourism activity
- Attract visitors who stay longer and spend more
- Deliver a more memorable quality experience
- Integrate the activities of the public sector across and within authorities and fully engage the private sector
- Be a membership organisation

Until the creation of Staffordshire’s DMP, the situation had been divided with separate Visitor Economy Strategies for the north and south of the county prepared by two different consultancies. Destination Staffordshire began its journey in late 2004, appointing a marketing agency to create a brand in December 2005 and formally launched in 2006. It was formed in a structured and representational way, across the whole of Staffordshire County Council area (still retaining its old shire county shape of

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6 The Cambridge Tourism Summit (Anglesey Abbey) March 14 2011
7 Prepared by Locum Consulting 2003-4
8 It distributed its first e-newsletter to members in December 2007 in which it stated it was “widely acknowledged to be the most advanced public/private sector partnership of its kind in the region”
districts and county) and the relatively new Unitary Authority of Stoke-on-Trent on Trent. In addition to the Local Authorities, it also needed to welcome and manage relationships with other overlapping and integral bodies including the Peak District National Park and its DMP, the National Forest and Cannock Chase AONB.

Its senior officer at the time set out the position thus⁹:

Staffordshire was centrally located with a unique industrial history, a rich cultural heritage and stunning landscapes.

The following three strategies had been influential in establishing the DMP:-

- Southern Staffordshire Visitor Economy Strategy 2003
- North Staffordshire Tourism Strategy 2004
- West Midlands Visitor Economy Strategy 2004

The Staffordshire DMP had been set up in the form of a mini tourist board to rationalise the limited resources, overcome duplication and to have a clear role in agreeing what was needed. The Partnership delivered tourism in a more effective and efficient way. They were customer focused; led by the needs of the industry with the aim that it will deliver a better visitor experience.

The DMP had been given approval to progress by the Leaders and Chief Executives Group on 1 November 2004. A delivery structure was agreed in December 2005 and a 3 year delivery programme was agreed in January 2006 aimed at:-

- Marketing and branding
- Information and E Tourism
- Product Development and Infrastructure
- Business Support, Quality, Training and Skills
- Research and Monitoring
- Membership
- External Funding

Destination Staffordshire’s remit is clearly stated on its trade website:

**Destination Staffordshire** is a dynamic partnership of visitor attractions, accommodation, Eating establishments, tourism businesses and local authorities that are working together to drive tourism in Staffordshire.

⁹ Roger Bradshaw, Head of Economic Development presenting to Cannock Chase Council in 2005
Our aim is simple. To use the collective strengths of all involved in Staffordshire to attract more customers into the county, keep them here longer and provide the highest standards of customer care while they’re here.

Since it was launched Destination Staffordshire has delivered a programme of activities guided by its 25-strong private/public sector Board which meets quarterly and also through a number of “theme” or sub-groups\textsuperscript{10}. Priorities have subsequently been partly influenced by AWM’s previous funding across what it called an “under-pinning programme” but Destination Staffordshire has recognised the need to regularly ‘review and refocus’ and to redefine its way forward in a crowded and changing market place. It has already produced a considerable number of research documents in its relatively short life, including impact evaluation, occupancy, visitor surveys, business surveys, socio-demographic analysis and economic outcome reports. Understandably it has yet to decide on the less tangible forensics of motivational and other examinations of its brand, marketing and product opportunities. There have also been and continue to be other Staffordshire marketing and branding studies some tourism-related and some corporate\textsuperscript{11}.

1.2 The purpose of the study

It is important to reiterate that the outputs from this work are for the Staffordshire DMP, the organisation: it is NOT a Tourism Strategy for the County of Staffordshire, although it is possible that it might well fulfil a considerable amount of any such future requirement.

The original brief specified a range of requirements but to summarise, this report aims to:

\begin{itemize}
  \item Assess what Destination Staffordshire has achieved through its programmes of activities
  \item Clarify the priorities for the DMP and help it focus on those activities which already do and will in the future deliver its objectives and maximum impact for members, the industry and for the county as a whole
  \item Test the market proposition, matching aspiration with reality and expectation and, if needed, suggest ways to set out even more clearly what Staffordshire is saying about itself to the visitor
  \item Present any challenges and opportunities that Staffordshire must both resolve and exploit including the links to the Festivals and Events Strategy (with which this study has liaised throughout) and the “special” opportunities and products available to Staffordshire and in some cases Staffordshire only.
\end{itemize}

\textsuperscript{10} Research, Marketing, Website, Green Tourism – all listed in the Appendices volume
\textsuperscript{11} E.g. Staffordshire Moorlands DC commissioned a Tourism opportunities study 2010-2011 and the new LEP has commissioned a branding and marketing review
• Provide an action plan for the next three years which is realistic and achievable, producing sustainable benefit to the Staffordshire tourism industry and the whole county.

That said, the Staffordshire DMP Strategy still needs to allow for flexibility and unforeseen resource issues at a time of economic uncertainty but also of new digital opportunities arising ever more rapidly and other topical, “one time only” opportunities to shine including Royal Weddings, Diamond Jubilees et al. We would therefore urge Destination Staffordshire as a whole to look outwards and upwards to gain maximum benefit from this work. It must likewise take maximum benefit from a range of projects and activities both within the county and in neighbouring areas. These and more inform the strategic actions, combined with the tactical and operational scope of our recommendations.

1.3 The Review process
A combination of around 40 one to one structured consultations with key operators and organisations, local authority officers and councillors, large and small businesses, PR and other suppliers, and an e-survey, of both DMP members and non-members, produced the baseline of opinion and experience from which areas of consensus, variation and prioritisation were identified. Online and offline reviews of materials and media, performance data and the DMP’s own research documentation as well as individual attractions data have also informed the process. A workshop open to all tourism stakeholders, presented the draft consensus conclusions and potential future priorities and asked for more detailed input on proposed actions. The report thus draws widely on the views of membership and stakeholders as well as evidence from national trends and intelligence and good practice elsewhere. Lastly, discussions with some members were held at the Annual Tourism Conference and further observations drawn.

1.4 The structure of the report
This report is structured to provide a logical sequence of how the recommendations and priorities have been reached so that the “trail” is visible and transparent. Thus the report reflects the progress from external and impartial assessment of data, proposition and marketing, activity programme, membership, communication and organisational style to consideration of consultation results, and thence to challenges and strategic opportunities and ultimately to prioritisation of investment and effort. The Action Plan then includes details of prioritisation and the most impactful activities giving the most effective return.
2. THE STAFFORDSHIRE VISITOR ECONOMY

2.1 The view from elsewhere

This chapter examines the performance and nature of the Staffordshire tourism industry, starting by setting out the perception of the county as a destination from the eyes of others:

For example, **Enjoy England:**

“Stunning countryside, miles of inland waterways and a host of world famous attractions combine to make Staffordshire stand out from the rest. It’s (sic) capital, Stoke-on-Trent-on-Trent, is the birthplace of English Ceramics, known affectionately the world over as The Potteries.”

**Lonely Planet:**

“Staffordshire, in the words of Stoke-on-Trent-born novelist Arnold Bennett, has long been ‘unsung by searchers after the extreme’ – but if you took that to mean ‘boring’ you’d be mistaken. Though it’s tucked between the urban sprawls of Birmingham and Manchester the county has a surprising abundance of natural beauty, from rolling Cannock Chase, a magnet for walkers and cyclists, to the prickly spine of the Peak District known as the Roaches. The haunting Gothic might of Lichfield’s wonderful cathedral, the wild rides at Alton Towers, and the neoclassical mansion of Shugborough are among the county’s other charms.”

**traveleye.com:**

“Located in the heartland of the UK and easily accessible from all regions, Staffordshire is a fascinating County, combining natural beauty with a tradition of world-shaping industry. The picturesque county town of Stafford offers something for everyone from Historic stately homes and ancient castles to beautiful gardens and exciting theme parks. In the town of Stoke-on-Trent-on-Trent you will find the famous visitor centres of fine porcelain such as Wedgewood (sic), Spode and Royal Doulton known as ‘The Potteries’ The nearby ‘Alton Towers’ theme park boasts over 150 rides and attractions and offers a great family day out. The city of Lichfield has many attractions including ‘Lichfield Cathedral, the only medieval English Cathedral with three spires.”

**Rough Guide to England:**

“......sprawling north of the Birmingham conurbation is Staffordshire, where Lichfield makes a good hand of its links with Samuel Johnson.”

**Britain Express website:**

“If all England’s counties could be accorded just single word descriptions, the moniker for Staffordshire would surely read "pottery". Stoke-on-Trent-on-Trent is the destination for lovers of English fine and collectible porcelain, and major pottery firms such as Spode, Wedgwood, and Royal Doulton have visitor centres and factory outlets in the area.”
There are numerous other websites providing guides for overseas visitors, e.g. Frommers, Fodors and more, of whom several have rather different geographic perspectives on Staffordshire and almost all of whom focus on “The Potteries” as the best known feature of the county.

The view from outside is always powerful. It influences perceptions and actions and cannot be underestimated in its impact. If it is inaccurate or negative, then remedial action must be taken. The impact of customer and peer reviews on sites such as TripAdvisor can make or break a business or a destination. Reputation is all and in a digital world can confer instant approval or condemnation in just one click.

2.2 Current Visitor Profile

The last general visitor survey carried out for Staffordshire was in 2005. Heart of England Tourism looked at the broad visitor profile, both day and staying.

- 71% of visitors are Day Visitors and 92% travelled to Staffordshire by car/motorcycle
- 28% originate from with the West Midlands Metropolitan Area
- 42% travelled to Staffordshire with their family
- 52% are classified as ABC1 demographically
- 43% are aged 45 years and over
- 88% are repeat visitors of which 42% have visited Staffordshire more than 10 times in the past 5 years
- 89% were on an additional holiday/short break & 62% stayed with friends or relatives
- 31% of visitors were visiting an attraction and 59% had used a TIC in Staffordshire
- 25% of visitors stated they liked the countryside/ rural nature of the area

As day visitors account for 71% of visitors to the county, it is not surprising that over a quarter (28%) of visitors come from the West Midlands region. The high levels of visitors from within a 1-1 ½ hour drive time may also account for the high levels of repeat visitors (88%), half of which have visited more than 10 times in the previous 5 year period. Just less than half travel with their family and area aged 35+. There is clearly scope here to increase the low number of new visitors to the area and to convert some of the high levels of day visitors to overnight stays.
Origin of visitors (2005)

<table>
<thead>
<tr>
<th>Day visitor</th>
<th>Touring UK</th>
<th>Overnight UK</th>
<th>Overseas Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>West Mids (28%)</td>
<td>Oxfordshire (15%)</td>
<td>West Mids Met Area (9%)</td>
<td>Australia (20%)</td>
</tr>
<tr>
<td>Staffordshire (23%)</td>
<td>Cheshire (7%)</td>
<td>Essex (5%)</td>
<td>USA (19%)</td>
</tr>
<tr>
<td>Cheshire (8%)</td>
<td>West Midlands (6%)</td>
<td>Worcestershire (4%)</td>
<td>Japan (6%)</td>
</tr>
<tr>
<td>Derbyshire (7%)</td>
<td>Merseyside (6%)</td>
<td>Hants/Isle of Wight (4%)</td>
<td>New Zealand (6%)</td>
</tr>
<tr>
<td>Shropshire (6%)</td>
<td>Kent (6%)</td>
<td>Surrey (4%)</td>
<td>Germany (5%)</td>
</tr>
<tr>
<td>Lancashire (5%)</td>
<td></td>
<td></td>
<td>Ireland (5%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Rest of Europe (5%)</td>
</tr>
</tbody>
</table>

The next table shows the breakdown of visitors by type of group, whether they have been to Staffordshire before and their socio-economic group.

Visitor Profiles

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Day Visitor</th>
<th>Touring UK</th>
<th>Overnight UK</th>
<th>Touring Overseas</th>
<th>Overnight Overseas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solo</td>
<td>6%</td>
<td>8%</td>
<td>0%</td>
<td>2%</td>
<td>0%</td>
<td>5%</td>
</tr>
<tr>
<td>Partner only</td>
<td>38%</td>
<td>40%</td>
<td>54%</td>
<td>30%</td>
<td>35%</td>
<td>34%</td>
</tr>
<tr>
<td>With family</td>
<td>42%</td>
<td>39%</td>
<td>26%</td>
<td>52%</td>
<td>41%</td>
<td>41%</td>
</tr>
<tr>
<td>With friends</td>
<td>9%</td>
<td>8%</td>
<td>4%</td>
<td>12%</td>
<td>12%</td>
<td>19%</td>
</tr>
<tr>
<td>With friends and family</td>
<td>4%</td>
<td>4%</td>
<td>15%</td>
<td>4%</td>
<td>3%</td>
<td>0%</td>
</tr>
<tr>
<td>Organised group/coach party</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
<td>9%</td>
<td>0%</td>
</tr>
<tr>
<td>Children in Group—yes</td>
<td>37%</td>
<td>38%</td>
<td>24%</td>
<td>39%</td>
<td>31%</td>
<td>19%</td>
</tr>
<tr>
<td>Children in group-no</td>
<td>63%</td>
<td>62%</td>
<td>76%</td>
<td>61%</td>
<td>69%</td>
<td>81%</td>
</tr>
<tr>
<td>New visitors</td>
<td>12%</td>
<td>6%</td>
<td>46%</td>
<td>15%</td>
<td>89%</td>
<td>47%</td>
</tr>
<tr>
<td>Repeat Visitors</td>
<td>88%</td>
<td>94%</td>
<td>54%</td>
<td>85%</td>
<td>11%</td>
<td>53%</td>
</tr>
</tbody>
</table>
UK visitors on holiday and overseas visitors are more likely to be new visitors, travelling without children and in higher socio-economic groups.

Main Activities Undertaken – HET 2005

<table>
<thead>
<tr>
<th>Activity</th>
<th>Total</th>
<th>Day Visitor</th>
<th>Touring UK</th>
<th>Overnight UK</th>
<th>Touring Overseas</th>
<th>Overnight Overseas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting an attraction</td>
<td>31%</td>
<td>35%</td>
<td>39%</td>
<td>18%</td>
<td>50%</td>
<td>17%</td>
</tr>
<tr>
<td>VFR</td>
<td>22%</td>
<td>10%</td>
<td>15%</td>
<td>61%</td>
<td>9%</td>
<td>59%</td>
</tr>
<tr>
<td>General Sightseeing</td>
<td>16%</td>
<td>17%</td>
<td>20%</td>
<td>10%</td>
<td>32%</td>
<td>10%</td>
</tr>
<tr>
<td>Shopping</td>
<td>15%</td>
<td>20%</td>
<td>2%</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Walking and Hiking</td>
<td>6%</td>
<td>8%</td>
<td>7%</td>
<td>2%</td>
<td>0%</td>
<td>3%</td>
</tr>
<tr>
<td>Cycling</td>
<td>3%</td>
<td>4%</td>
<td>2%</td>
<td>0%</td>
<td>0%</td>
<td>2%</td>
</tr>
</tbody>
</table>

All activities Undertaken by Type of Visitor

<table>
<thead>
<tr>
<th>Activity</th>
<th>Total</th>
<th>Day Visitor</th>
<th>Touring UK</th>
<th>Overnight UK</th>
<th>Touring Overseas</th>
<th>Overnight Overseas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eating Out</td>
<td>61%</td>
<td>55%</td>
<td>56%</td>
<td>78%</td>
<td>69%</td>
<td>86%</td>
</tr>
<tr>
<td>Visiting an attraction</td>
<td>53%</td>
<td>47%</td>
<td>48%</td>
<td>71%</td>
<td>69%</td>
<td>79%</td>
</tr>
<tr>
<td>General Sightseeing</td>
<td>53%</td>
<td>48%</td>
<td>72%</td>
<td>61%</td>
<td>74%</td>
<td>78%</td>
</tr>
<tr>
<td>Shopping</td>
<td>46%</td>
<td>38%</td>
<td>35%</td>
<td>67%</td>
<td>63%</td>
<td>84%</td>
</tr>
<tr>
<td>Walking/hiking</td>
<td>35%</td>
<td>29%</td>
<td>44%</td>
<td>50%</td>
<td>34%</td>
<td>47%</td>
</tr>
<tr>
<td>VFR</td>
<td>28%</td>
<td>15%</td>
<td>37%</td>
<td>67%</td>
<td>26%</td>
<td>74%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
<td>9%</td>
<td>11%</td>
<td>4%</td>
<td>11%</td>
<td>7%</td>
</tr>
</tbody>
</table>
More recent data is available for **staying visitors** from the most recent self-completion Visitor Survey run in **2010**. Both accommodation and attraction operators participate in this, which had a total of around 50 businesses providing questionnaires to visitors. Information is analysed by the Research Unit at Staffordshire County Council showing the type of visitors who come to the area, what they do and how much they spend. This information is then available to inform the marketing campaigns carried out within the county. The following findings are based on **overnight visitors** to participating **accommodation establishments** across Staffordshire. Day visitors are **not** included.

### Source of Awareness

<table>
<thead>
<tr>
<th>Source of Awareness</th>
<th>How did you find out about Staffordshire?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
<td>35%</td>
</tr>
<tr>
<td>Repeat Visit</td>
<td>26%</td>
</tr>
<tr>
<td>Other</td>
<td>13%</td>
</tr>
<tr>
<td>Local Awareness</td>
<td>11%</td>
</tr>
<tr>
<td>Personal Recommendation</td>
<td>11%</td>
</tr>
<tr>
<td>Tourist Information Centre</td>
<td>7%</td>
</tr>
<tr>
<td>Tourism Leaflet/Brochure</td>
<td>7%</td>
</tr>
<tr>
<td>Advert in Newspaper/Magazine</td>
<td>2%</td>
</tr>
</tbody>
</table>

*Numbers add up to more than 100% as more than one response could be given*

Use of the website (35%) and a previous visit (26%) were the top sources of information cited on finding out about Staffordshire by those staying overnight in the County.

### Main Reasons for stay/holiday in Staffordshire

Over a third of overnight visitors indicated their main reason for staying in the area or on holiday was to visit a Theme Park (35%). The scenery/landscape was noted by a quarter (25%) of visitors, with a further 19% citing a visit to their friends/relatives as their main reason for staying. This offers a different perspective from that of the e-survey where results suggested that walking was the main activity for guests, although the latter was sent to a much wider range of recipients than accommodation providers.

See table.
### What are your main reasons for your stay/holiday

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit a theme park</td>
<td>35%</td>
</tr>
<tr>
<td>Scenery/landscape</td>
<td>25%</td>
</tr>
<tr>
<td>Visiting friends/relatives</td>
<td>19%</td>
</tr>
<tr>
<td>Peace and quiet</td>
<td>18%</td>
</tr>
<tr>
<td>Outdoor activities</td>
<td>17%</td>
</tr>
<tr>
<td>Enjoyed previous visit</td>
<td>13%</td>
</tr>
<tr>
<td>Easy to get to</td>
<td>13%</td>
</tr>
<tr>
<td>Event</td>
<td>12%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
</tr>
<tr>
<td>Business trip</td>
<td>8%</td>
</tr>
<tr>
<td>Recommendation from others</td>
<td>4%</td>
</tr>
<tr>
<td>Stop over as part of a longer journey</td>
<td>4%</td>
</tr>
</tbody>
</table>

### How was their accommodation booked?

Use of the internet to book accommodation was noted by 29% of visitors but 63% of visitors had booked by phone. It is not known if this is due to lack of online bookability or simply a preference to ring. Only 7% had booked via email with just 1% booking via post. Either way, there is a need to know the reasons for such variation since national trends show online booking is overtaking all other methods.
Start date of stay in Staffordshire

The months of May and June were most popular with visitors when starting their visit to Staffordshire. November and February were the least likely times that respondents would make a visit, much the same as usual patterns for UK leisure tourism with the exception of September/October where higher numbers would normally be expected due to post school holidays for older markets and half term for families.

Length of Stay

On average, visitors were staying in Staffordshire for 3.7 days.\(^{12}\)

\(^{12}\) Slightly less than the earlier HET study showing an average of 4.4 days
Length of stay in Staffordshire

Expenditure

The average spend per party of visitors staying overnight in Staffordshire was £382.
Age group of visitors

41% of visitors to Staffordshire were aged 45 and over 18% were aged 0-15. There has been little change in the age profile of visitors since the survey undertaken in 2005.

Other responses received included:

- 95% of visitors rated their visit to Staffordshire as excellent or good.
- 99% of visitors stated they would or they had recommended Staffordshire to a friend/relative
- 53% of visitors stated green issues were an important or very important consideration when deciding upon a holiday
- 90% of visitors to Staffordshire were visiting with family and/or friends

The visitor attractions participating in the Staffordshire Visitor Survey 2010 also collect general data which includes day visitors.

- 76% of respondents were on a day trip to Staffordshire
- 34% of respondents found out about the attraction from local awareness (not specific marketing)

13 A highly encouraging figure which should be used in marketing and PR if robust enough a sample
• 70% of respondents stated the main reason for their visit to the attraction was for the attraction itself
• 76% of visitors to attractions within Staffordshire had visited with their friends and/or family
• 36% of overnight visitors were staying in Staffordshire for 4 days
• 46% of overnight visitors were staying with friends or relatives
• May was the peak month when 25% of respondents visited the attraction, perhaps reflecting both the early May holiday and the school half term week
• 66% of visitors stated they had spent between 1-3 hours at the attraction
• 24% of respondents had a total party spend of between £10-£19 at the attraction during their visit
• 89% of respondents stated they had not used any promotion voucher, including the Enjoy Staffordshire Card, for their trip
• 99% of visitors stated they had or intended to recommend this attraction to a friend/relative (see footnote 12 again)
• 60% of visitors had not visited any other attraction in Staffordshire on this trip
• 85% of respondents rated Staffordshire as excellent or good

Staffordshire Market Segments
A study was undertaken by Arkenford on behalf of AWM (Advantage West Midlands) in 2009. The research was specifically to understand the current visitor profile to the West Midlands and the eight different DMPs within the region and how each DMP area appeals to each of the eight ArkLeisure® segments – summarised in the diagram below. The ArkLeisure® Model splits the population into distinct customer groups and their differing holiday and leisure behaviour, what drives their choice of destination, use of information channels and their response to different marketing messages.
Day Visitors – Staffordshire receives more Cosmopolitans and Functionals than the West Midlands average, with far fewer Habituals.

Day visitors from a holiday base - Staffordshire receives more Discoverer, Cosmopolitans, Functionals and Traditionals than average with far fewer Style Hounds and High Streets.
Staying visitors – Shows a different pattern with more than average Habituals, High Streets and Followers and far fewer Traditionals.

Conclusions from this analysis might indicate that marketing to the customer segments already coming to Staffordshire is, as classic marketing theory dictates, is the most likely way to succeed and that day visitor campaigns should be targeted to different segments from staying visitor campaigns. The only segment which does not visit much in any of the three charts above is Style Hounds – the young, free and single types into fashion and fun. This is somewhat puzzling, bearing in mind the Alton Towers factor and considering that up to 50% of their market are young adults.

The research confirmed that most of the UK staying visitors (not touring) come from the East or West Midlands and the North West. London and the South East are rather low source areas for visitors staying only in Staffordshire but the SE is the highest source for touring visitors as shown below.
Arkenford’s online methodology, surveying and screening from a countrywide database of 3,500 split into day, stay, possible (called in their study ‘potential’) and ‘rejecter’ visitor markets resulted in a picture of what are called ‘potential visitors to Staffordshire’ meaning that these are people who haven’t ever visited but have not rejected the idea out of hand. The larger ‘potential’ i.e. possible visitor figure from London and the South East obviously reflects the larger population base and is generally always the biggest potential market for most consumer sectors. However, it does offer opportunity for the DMP to grow both volume and value from these areas.

Staffordshire: Potential visitors
2.3 Industry Performance

Economic Impact of Tourism

The Holy Grail for most DMPs and indeed most DMOs is to be able to demonstrate the economic impact their activities have had. The models for doing this have long been argued over especially the comparative virtues of the top-down ‘Cambridge’ or the bottom-up ‘STEAM’ models. ‘Satellite accounting’ models have all but disappeared from the argument due to their complexity and cost, the latter being the most common barrier for measuring the performance of tourism in general. Thus there is a general anxiety about the robustness of almost all data from national level down. However, it is vital to have it in order to make the case for both public and private sector support and often the reason why most local authority tourism units are in Economic Development departments. In recent years the NWDA, for example, invested heavily in measuring the value of the heritage pound and the Heritage Lottery Fund (HLF) undertook a large study to measure the value of heritage tourism working with Visit Britain and the newly established Visit England. It demonstrated that heritage tourism alone outperformed both the car manufacturing, film and advertising industries estimating its gross domestic product (GDP) contribution to be £20.6 billion.

Key points

- Over 10 million holiday trips are made by overseas visitors to the UK each year with 4 in 10 leisure visitors citing heritage as the primary motivation for their trip to the UK – more than any other single factor
- Domestic tourism or the ‘staycation’ is the main component of this expenditure; of the annual £12.4 billion spent on heritage-based tourism, 60% comes from UK residents on day trips and UK holidays
- £7.3 billion of heritage expenditure is based on visits to built heritage attractions and museums, with the bigger £12.4 billion including visits to parks and the countryside as well
- The direct GDP contribution of heritage tourism – the wages and profits earned by tourism businesses, such as hotels, restaurants and shops, as well as heritage attractions themselves – is estimated at £7.4bn a year. Once economic multiplier impacts are added – such as the income

14 Although still used by a number of countries elsewhere
15 The Economic Value of Heritage in the North West – Amion, Taylor Young and Locum Consulting for NWDA 2009
16 Investing In Success – The value of Heritage Tourism 2010 HLF
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earned by suppliers to tourism businesses – the total GDP contribution of heritage tourism is £20.6bn a year

Tourism at England level is estimated to contribute c 8% of GDP. Such proportions are often easier to assess than bare figures alone. Indicators most used are overnight stays, type of accommodation used, nature of party, length of stay and services used whilst on trip.

An economic impact assessment has been undertaken in Staffordshire over the past three years. The assessment focuses upon the estimates of the overall volume of visits undertaken to the County, expenditure in the local economy and the number of jobs that are dependent upon tourism during this period.

The following is a summary of tourism’s most recent economic impact in Staffordshire:

- Growth in trips, nights & spend in past 3 years, though 2008 total trips fell (beginning of credit crunch)
- Day trips account for 93% of the total trips to Staffordshire, only 7% attributed to overnight visits.
- Expenditure over £1 billion in 2009
- Tourism-related jobs have increased by over 13% since 2007
- Overall, 2009 was a positive year for UK domestic tourism in Staffordshire, in line with the national trend and possible ‘Staycationing’ effect due to economic recession

Staffordshire Economic Impact of Tourism 2007-2009

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>07-08 % Change</th>
<th>2008</th>
<th>08-09 % Change</th>
<th>2009</th>
<th>09-08 % Change</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Million</td>
<td></td>
<td>Million</td>
<td></td>
<td>Million</td>
<td></td>
</tr>
<tr>
<td><strong>TRIPS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Trips</td>
<td>18.6</td>
<td>1.08-</td>
<td>18.4</td>
<td>9.24+</td>
<td>20.1</td>
<td>8.06+</td>
</tr>
<tr>
<td>Day Trips</td>
<td>17.2</td>
<td>0</td>
<td>17.2</td>
<td>8.72+</td>
<td>18.7</td>
<td>8.72+</td>
</tr>
<tr>
<td>Overnight visits</td>
<td>1.4</td>
<td>14.29-</td>
<td>1.2</td>
<td>16.67+</td>
<td>1.4</td>
<td>0</td>
</tr>
<tr>
<td><strong>NIGHTS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total nights</td>
<td>4.3</td>
<td>4.65+</td>
<td>4.5</td>
<td>2.22+</td>
<td>4.6</td>
<td>6.98+</td>
</tr>
<tr>
<td><strong>SPEND</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total spend</td>
<td>£902</td>
<td>0</td>
<td>£902</td>
<td>10.87+</td>
<td>£1,008</td>
<td>10.87+</td>
</tr>
<tr>
<td>Overnight</td>
<td>£190.4</td>
<td>0.21+</td>
<td>£190.8</td>
<td>21.59+</td>
<td>£232</td>
<td>21.85+</td>
</tr>
<tr>
<td>Day trip</td>
<td>£711.5</td>
<td>0</td>
<td>£711.5</td>
<td>9.15+</td>
<td>£776.6</td>
<td>9.15+</td>
</tr>
<tr>
<td><strong>JOBS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total jobs</td>
<td>22,992</td>
<td>1.57+</td>
<td>23,353</td>
<td>11.68+</td>
<td>26,081</td>
<td>13.44+</td>
</tr>
</tbody>
</table>
Tourism Volume and Value performance comparisons

The United Kingdom Tourism Survey (UKTS) is a national consumer survey measuring the volume and value of overnight domestic tourism trips taken by residents of the United Kingdom. The survey covers trips taken for any purpose, whether for holiday, business, visiting friends and relatives or some other reason.

The International Passenger Survey (IPS) is a large multi-purpose survey that collects information from passengers as they enter or leave the United Kingdom. It is carried out by the Office for National Statistics (ONS) for a range of public and private sector organisations. Travellers passing through passport control are randomly selected for interview and all interviews are conducted on a voluntary and anonymous basis. Interviewing is carried out throughout the year.

2009 was a positive year for domestic tourism and showed an increase in the number of trips taken in the UK. This followed a difficult year in 2008 which was probably hit by the economic recession which became evident in the second half of the year. The increase in 2009 was due to a rise in demand for domestic holiday trips during the year as people took holidays closer to home not only due to financial reasons but other factors such as fear of air strikes, volcanoes and unrest in certain parts of the world.

2011 may indeed turn out to be the same.

### Domestic Tourism

<table>
<thead>
<tr>
<th>UKTS Data</th>
<th>West Midlands</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trips</td>
<td>2007</td>
<td>2008</td>
</tr>
<tr>
<td></td>
<td>8.4</td>
<td>7.76</td>
</tr>
<tr>
<td>Nights</td>
<td>20.12</td>
<td>20.7</td>
</tr>
<tr>
<td>Spend</td>
<td>1184</td>
<td>1149</td>
</tr>
</tbody>
</table>

The economic downturn of 2008-9 has negatively impacted on inbound visitor numbers from outside the UK, though spend has held up, supported by the weaker pound. In 2009, there were 25.4 million
inbound visits to England, of which 1.6m were to the West Midlands region together accounting for 6% of all trips. 4% of the £14.4 billion spent by overseas visitors was spent in the West Midlands (£595bn). Overseas visitors spent 199 million bed nights in England, and the average visitor stayed for 7.8 nights and spent £568.

### International Tourism

<table>
<thead>
<tr>
<th>IPS Data</th>
<th>West Midlands</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2007</td>
<td>2008</td>
</tr>
<tr>
<td><strong>Trips</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.7</td>
<td>1.8</td>
</tr>
<tr>
<td><strong>Nights</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Spend</strong></td>
<td>522</td>
<td>614</td>
</tr>
</tbody>
</table>

The UKTS and IPS data shown in the tables above do not include day visits so cannot be directly compared with the Cambridge Model figures shown earlier. Thus, whilst it might appear that Staffordshire visitor figures are performing above the national statistics it is not possible to claim a direct comparison, like with like.

The heavy dependence on day visitor markets to Staffordshire plus the very high repeat visit figures do however, almost perversely, offer considerable scope for increasing value from the ‘staycationing’ opportunities as well as the additional short break takers trading ‘down’ from overseas short breaks into Europe. Higher spending overseas visitors are clearly important target segments for any UK destination although frequently requiring more effort and investment to secure. Staffordshire, however, does have some specific opportunities and products to attract those markets.

### Accommodation Occupancy

There are currently two surveys providing occupancy data for Staffordshire. The England Occupancy Survey (EOS) looks at all types of serviced accommodation including B&B’s, Guesthouses and Hotels and collects information on both room and bed occupancy levels. In the West Midlands region, LJForecaster provides room occupancy levels on the larger hotels only. The following charts look at both sets of data and how Staffordshire accommodation occupancy compares with the rest of England.
Overall, the room occupancy levels in Staffordshire are significantly below those witnessed in the West Midlands and across England as a whole. The sample size within Staffordshire for the occupancy survey is very low (9) and results should thus be treated with a degree of caution. Those participating represent the smaller establishments and not the larger volume hotels, making the results rather less representative. Increased participation in this study needs to be encouraged to show a more representative picture of the accommodation sector in Staffordshire. One way of increasing participation would be actively to encourage members of Destination Staffordshire to join the national survey and to understand its value to them in the future:

**Room Occupancy 2010 – England Occupancy Survey**

![Room Occupancy Graph]

A similar pattern is shown in the bed occupancy levels of the next table:

**Bed Occupancy 2010 – England Occupancy Survey**

<table>
<thead>
<tr>
<th></th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staffordshire</td>
<td>17%</td>
<td>18%</td>
<td>23%</td>
<td>50%</td>
<td>40%</td>
<td>38%</td>
<td>56%</td>
<td>33%</td>
<td>35%</td>
<td>32%</td>
<td>28%</td>
<td>33%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>30%</td>
<td>47%</td>
<td>47%</td>
<td>59%</td>
<td>70%</td>
<td>68%</td>
<td>68%</td>
<td>62%</td>
<td>70%</td>
<td>58%</td>
<td>64%</td>
<td>49%</td>
</tr>
<tr>
<td>England</td>
<td>42%</td>
<td>52%</td>
<td>51%</td>
<td>59%</td>
<td>67%</td>
<td>73%</td>
<td>77%</td>
<td>72%</td>
<td>75%</td>
<td>69%</td>
<td>61%</td>
<td>52%</td>
</tr>
</tbody>
</table>
Hotel Room Occupancy – LJForecast

The highest levels of room occupancy was witnessed in July 2010, with January 2011 showing only 49% room occupancy in Staffordshire.
Tourism Review, Strategy and Action Plan for Destination Staffordshire
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Visitor Attraction Attendances

The table below lists most of the main visitor attractions and demonstrates how important some are to the visitor economy. Visitor numbers are not available for all attractions as some attractions do not report their numbers and some don’t report every year. However, attractions listed in bold bring over 100,000 visitors each annually to Staffordshire.

<table>
<thead>
<tr>
<th>Attraction</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>+/- %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alton Towers</td>
<td>not supplied but estimate 3m in 2009-10</td>
<td>+</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Biddulph Grange Garden (NT)</td>
<td>60,926</td>
<td>57,501</td>
<td>72,506</td>
<td>+19%</td>
</tr>
<tr>
<td>Birches Valley Forest Centre</td>
<td>Numbers not supplied</td>
<td>+ 21%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Boscobel House (EH)</td>
<td>10,528</td>
<td>10,274</td>
<td>10,384</td>
<td>-1.4%</td>
</tr>
<tr>
<td>Brindley Mill and Museum</td>
<td>715</td>
<td>586</td>
<td>567</td>
<td>-20.6%</td>
</tr>
<tr>
<td>British Wildlife Rescue Centre</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chasewater Railway</td>
<td>43,400</td>
<td>49,345</td>
<td>58,054</td>
<td>+33.8%</td>
</tr>
<tr>
<td>Cheddleton Flint Mill</td>
<td>5,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Churnet Valley Railway</td>
<td>75,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coors Visitor Centre (now National Brewing centre)</td>
<td>46,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drayton Manor Park</td>
<td>not supplied but estimate 1.1m</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Heart of the Country Centre</td>
<td>250,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ilam Hall Country Park</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lichfield Cathedral</td>
<td>100,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Moseley Old Hall (NT)</td>
<td>23,031</td>
<td>23,614</td>
<td>24,271</td>
<td>+5.4%</td>
</tr>
<tr>
<td>Museum of Cannock Chase</td>
<td>59,727</td>
<td>44,562</td>
<td></td>
<td></td>
</tr>
<tr>
<td>National Memorial Arboretum</td>
<td>130,034</td>
<td>294,792</td>
<td>267,836</td>
<td>+106%</td>
</tr>
<tr>
<td>The Potteries Museum &amp; Art Gallery</td>
<td>110,227</td>
<td>127,258</td>
<td>150,338</td>
<td>+36.4%</td>
</tr>
<tr>
<td>Samuel Johnson Birthplace Museum</td>
<td>10,170</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sandon Hall</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shire Hall Gallery</td>
<td>86,510</td>
<td>86,257</td>
<td>83,736</td>
<td>-3.2%</td>
</tr>
<tr>
<td>Shugborough Hall (NT and SCC)</td>
<td>121,638</td>
<td>104,440</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staffordshire Regiment Museum</td>
<td>13,813</td>
<td>9,555</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trentham Gardens</td>
<td>Visitors to Trentham Estate estimate 3m</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trentham Monkey Forest</td>
<td>229,000</td>
<td>211,543</td>
<td>227,844</td>
<td>-0.5%</td>
</tr>
<tr>
<td>Tutbury Castle</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Wolseley Centre</td>
<td>28,022</td>
<td>30,439</td>
<td>36,055</td>
<td>+28.7%</td>
</tr>
<tr>
<td>Wall Roman Site (Letocetum)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Waterworld</td>
<td>470,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Weston Park (house visitors only)</td>
<td>27,455</td>
<td>22,255</td>
<td>19,761</td>
<td>-28.0%</td>
</tr>
<tr>
<td>Whitmore Hall</td>
<td>1,859</td>
<td>1,524</td>
<td>1,375</td>
<td>-26%</td>
</tr>
<tr>
<td>Wightwick Manor (NT)</td>
<td>28,955</td>
<td>32,738</td>
<td>42,860</td>
<td>+ 48%</td>
</tr>
</tbody>
</table>

Source: Visit Britain, Visitor Attractions Surveys
The huge growth in visitors at the National Memorial Arboretum (NMA) is of considerable importance, which, because of international circumstances, will probably increase still further in the next few years. Whilst the underlying reasons for this are of course very sad, the significance of the Arboretum to the county visitor economy cannot be missed and the DMP must, working sensitively with partners, ensure that this is factored into the character and personalisation of the visitor offer. The NMA has considerable profile in the national media and Staffordshire must ensure it maximises the benefits this offers.

Alton Towers had its best year in 2010 and its 10 year plans mean further investment in both the attraction and also in its heritage assets. The increased numbers at the Potteries Museum, due to the Staffordshire Hoard, must also be regarded as an indicator of interest at local and national level and likewise maximised. These issues are covered in the strategic and specific opportunities section as well as the recommendations.

**Business Tourism**

This element of the tourism industry is important to the Staffordshire economy. Staffordshire and Stoke-on-Trent Trent Conference Bureau is responsible for raising the profile of Staffordshire as a conference and meetings destination bringing new business and increasing the volume and value of business tourism into the county. The bureau is a public/private sector partnership generating on average £150-200,000 per year.

Research undertaken by KPMG in 2005 on behalf of Tourism West Midlands found that an estimated 208,000 conference and 392 exhibitions were held in the West Midlands Region during 2005, in turn attracting 14 million visitors and delegates.

Further research using both the KPMG study and the Staffordshire Cambridge Model\(^\text{17}\), was undertaken by The Research Solution in 2009 to assess the value of business tourism in Staffordshire using both these studies as a basis.

- In terms of business tourism, Staffordshire is worth 10% of the West Midlands business tourism total.
- When applied to the KPMG model West Midlands total of £6.6 billion, this equates to a business tourism impact for Staffordshire of approximately £660 million (generated through the conference bureau marketing and the marketing work of the individual venues).
- The direct and indirect impact of £660 million supports around 20,000 jobs in Staffordshire.

\(^{17}\) The Cambridge Model is economic tourism model looking at volume and value of the tourism industry
Business Tourism in Staffordshire

<table>
<thead>
<tr>
<th></th>
<th>Visits (m)</th>
<th>Nights (m)</th>
<th>Spend (m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>West Midlands Total</td>
<td>14</td>
<td>3.7</td>
<td>6600</td>
</tr>
<tr>
<td>Staffordshire Tourism Proportion (%)</td>
<td>12%</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Staffordshire Total</td>
<td>1.7</td>
<td>0.4</td>
<td>660</td>
</tr>
</tbody>
</table>

The Bureau’s own research has indicated an overall return on investment of about £17 for every £1 invested in business tourism activity.

General Tourism Business Confidence

Destination Staffordshire has commissioned business monitoring research every year since 2006 collecting data on the activities and experiences of a selection of about one hundred businesses from across the area. The latest headline indicators are for April - September 2010 and report results on five key aspects of the Staffordshire visitor economy. These appear reasonably mixed, given the difficult economic climate. Many indicators are reasonably positive, except for staffing levels where there appear to be some cuts in staffing.

Business activity

51% reported growth (compared to 48% in the previous monitoring period but 58% in Spring-Summer 2009)
27% reported a reduction (31% in the previous monitoring period)

Staffing

14% recorded growth in staff levels (18% previously)
21% recorded reductions (12% previously)

Business Investment levels

62% reported new business investment over and above normal maintenance activity (73% in the previous monitoring period and 65% in April-September 2009)

Businesses participating in the monitoring invested around £4.5m over the period
Expectations
37% expect increased business over the next six months (whereas 51% were in this category in the previous monitoring period)
44% anticipate no change (32% previously)
19% expect a decrease (17% previously)

Marketing and promotion
35% of businesses increased their marketing activity (26% in the previous monitoring period)
13% reduced their activity (as against 10% previously)

Some observations on the DMP Research portfolio
There is a wealth of research undertaken in the past few years which is a demonstration of the commitment of the DMP and its Research Group as well as of the County Council research unit, to arm itself with data analysis in order to inform its activity and identify its impact and thus aim for sustainability and industry and public support. An area for improvement, however, is the lack of an overall framework into which all this diverse research could usefully fit. For instance, there is an over-reliance on the 2005 visitor survey which needs updating. Also, some research is based on self-completion responses which bring with them elements of self-selection, weaker credibility and cannot be robustly compared against differently generated data. Some of the data is generated from a very low sample base, other analysis and research has been undertaken using large samples and at a highly professional level. Some analysis is done ‘in-house’ by DMP officers and also by the County research unit. Demographic analysis has been produced by industry specialist CACI et al but has varying usage. Certainly the Staffordshire DMP probably has far more data and research than any other West Midlands DMP and possibly in the country. However, its very diversity in method and output, and its mix of both up-to-date and dated information means that the DMP and its partners may not be getting the maximum benefit from it. The lack of more external research e.g. more detailed perceptions of the County (or the reasons for lack of any perception) from outside, or the difficulty of sharing databases across districts in order to investigate conversion, for example, indicate possible gaps which could, if filled, add more real value to the intelligence base already there and thus more informed actions. TIC data and research could equally be integrated into the research framework more overtly. We return to this in the strategic recommendations.
2.4 The Staffordshire ‘visitor offer’

The 1990s campaigns characterised the Staffordshire proposition as “Short breaks with long memories”. The 2004 description of Staffordshire as a visitor destination when the DMP was formed centred on: “a unique industrial history, a rich cultural heritage and stunning landscapes.”

Enjoy Staffordshire’s 2010 Press pack opening proposition was:

“Staffordshire is not only a hidden gem, it is also a one-stop destination for nature lovers, culture vultures and thrill addicts alike.

As well as being home to the recently discovered Staffordshire Hoard the county is full of national treasures, from great expanses of glorious countryside, historic forest and more miles of canal than any other shire county, to celebrated museums and castles, world renowned theme parks and the UK’s only monkey forest.”

This reveals the difficulty of creating a compelling and unified offer from a large county with a diverse mix of urban/rural, north and south reach, theme parks and industrial heritage to name a few of the divergences. It also highlights the weakness of trying to be ‘all things to all people’ and the fatal “something for everyone” tag, driven understandably by the very fact of being a partnership, having members and needing to provide an ‘umbrella’ that all can comfortably get under. The “World of Possibilities” and “For Culture, Nature or Adventure, Staffordshire has it all” does try to cover everything and gain generic support from partners. However, as we shall see from the consultations, many of those partners also understand the possible downside of such an approach.

The name of Staffordshire is perhaps in itself a slight barrier for some markets. Its name does not carry the same positive associations which some shire counties have with their county towns, such as Cambridge/Cambridgeshire, Chester/Cheshire, York/Yorkshire, Oxford/Oxfordshire or even Worcester/Worcestershire. In common with some other ‘middle of England’ areas, it suffers from geographic uncertainty and the M6 syndrome which means millions of people go past and through it but are never entirely sure where it starts and ends. Staffordshire, the name, may still carry resonance in some markets with mining, ‘metal bashing’ and even rather fierce dogs, just as much as with the famous Staffordshire Potteries which still appear to be used as both a geographic locator as well as an industry brand as seen in the website descriptions above where it is largely written of with some affection. Indeed Stoke City’s place in the FA Cup Final evoked considerable and largely positive coverage.
These issues may go some way to explain why some of the major attractions don’t use the county name in their promotional materials, either as a brand or as a locator. Equally some attractions are already such household names and do not need the county name or for their own branding to be diluted. Does this really matter? Opinions are divided and we return to this later when considering in more detail the most effective marketing activity for the future. “Made in Staffordshire” is an emerging initiative at county level designed to promote and maximise the range of products made in the county which are worth shouting about. It may well have a value for future DMP activity as well.

For now, it is worth looking again at Arkenford’s 2009 research to review perceptions of the West Midlands county areas by non-local markets, where Staffordshire and other Midlands shire counties all reveal approximately the same levels of “no perception”, “would not consider” and “would consider” and thus growth potential for higher awareness and visitation levels.

There is no doubt that the county is better placed than many of the other shire counties, having an active and resourced DMP intent on improving the awareness of the area as a visitor destination. Perception of an area, just as perception of value, quality or character, is what matters most. “No perception” as shown above should concern anyone in tourism: it is better than “bad perception” but having a nil perception on ‘possible’ visitors’ radars will not help to convert them into actual visitors. The options for the DMP through its existing programmes of activity are considerable and since 2009, it is highly likely that the Staffordshire Hoard will have upped the perception of the county as an area. Overseas press interest in Staffordshire’s royal connections largely through its ceramic productions for the recent Royal Wedding and for next year’s Diamond Jubilee has also done much good.
However, the question still needing to be addressed by the DMP is that of deciding the best way to deliver more value into the county, as well as volume: that is to say, does it do it by promoting awareness of the county through its strong and well-known consumer product brands (thus following the real model of “attract and disperse”), or by promoting the county name as a brand, or by a combination of both. The staying visitor certainly spends more per capita and it is more of this elusive visitor that the DMP must attract through compelling marketing and good value propositions.

Certainly parts of the County will be reassured by their location within Visit England’s new attract brand “mapping”, be they a geographically distinct area - the Peak District – or a major attraction – Alton Towers.

We examine this later in the approach and strategic recommendations.
3. REVIEW OF DMP ACTIVITIES 2008-11

This section draws on the results of the consultation discussions, the e-survey, research documentation where appropriate, the workshop debate and consultants’ own observations in order to present the performance of Destination Staffordshire and its activities over the last three years. Specific quotes (unattributed) are used to illustrate the points made and give a flavour of the responses.

3.1 What worked well and what impact did it have?

On the whole the Staffordshire DMP is seen as active, hard-working, enthusiastic and well organised. Many stakeholders appreciate how it has brought together a good representation of the public and private sector and harnessed efforts to deliver some strong activity. Some private sector respondents welcomed the opportunity to explain business issues to the public sector and the public sector tended to appreciate the drive and realism provided by business Board members.

“It’s a tight group and tends to get things done. It’s realistic about what is achievable – not too pie in the sky.”

“It’s a really good team – you are not allowed to not follow through on actions.”

“It’s very enthusiastic and well organised. They deal with statistics very well – make strategic decisions based on statistics and facts.”

“It’s a public-private partnership which works. It’s not just for the sake of it. It has a framework and delivery programme and is strongly backed by commercial thinking. It’s backed up by good research on trends – proactive...The people are very committed – it’s not just a talking shop but produces tangible results. It’s one of the best examples of a DMP in the country.”

“It’s a balanced board which has been keen to experiment with new things.”

“It has involved the private sector well and made a good effort to listen to and engage them in the decision making.”

Most members felt the main benefits of membership and working with Destination Staffordshire are either the marketing or promotion of the whole county and specific opportunities for their own business/organisation and/or the joint working and round table discussions involved in the Partnership. The DMP helps make small budgets go further – not only in the private sector but also for those local authorities most engaged. Some larger attractions felt, almost altruistically, that it was part of their “attract and disperse” role and of course it also helped their relationships with the public sector.
“Good newspaper and promotional campaigns which people can’t produce on their own. It makes our marketing budget go much further.”

“The cross over with Staffs and Peak District has strengthened and additional funding for rural tourism has been very welcome.”

“Being part of a bigger brand is great.”

“We have such limited resources we wouldn’t be able to deliver tourism and promote the local offer on our own.”

“We’re part of the Staffs family and cross promote.”

“We see ourselves as the DMP – it’s like a shared service – utilising scarce resources effectively.”

“It’s good to network with other districts, have contact with key attractions and the economic data is very useful. The DMP is an umbrella for us all and brings us round the table.”

“It’s a chance to participate in promotional work – more bang for your buck and truly joined up thinking.”

Several more specific comments were made about key benefits:

“Businesses benefit from specific campaigns and access to business advice and training.”

“A major advantage is the DMP role in increasing our marketing and links into business and conference activity.”

“Particularly keen on the EQM and green quality scheme – anything which is addressing more sustainable and responsible ways of attracting people to the Peak District.”

In terms of the DMP’s specific activities there were many positive views about marketing, research and the use of Key Performance Indicators, the STAGS green accreditation scheme\(^\text{18}\) and the focus on environmental issues and Taste of Staffordshire. Consultees acknowledged that good progress had been made on raising and improving the profile of the county as a whole by ‘pulling and pushing’ constituent parts together.

“It’s getting to grips with new types of marketing – online etc.”

“Marketing materials are good on the whole. Good focus group working on environment/STAGs.”

“The website’s looking good now and the mobile version of it.”

“Good campaigns, high profile, good use of outdoor imagery.”

\(^\text{18}\) Staffordshire Environmental Quality Mark, formally launched on March 30 2011 at the annual DMP Conference
“The enjoy card is an example of how the DMP is proactive rather than reactive.”

“GuestLink, website and mobile website are great. Thrill hopper tickets good but not enough people know about it. The training proposition has been very well received. Publications, map, brochure, newspaper all very good.”

“It’s strong in terms of the visual look – vibrant. Good short breaks campaign. The Out and About has been good.”

The review’s e-survey was emailed by the DMP’s office to all 400 members and 920 non-members in late January 2011 to gain an understanding of the views of the industry in Staffordshire. The survey generated 83 completed responses which represents a response rate of 6%. This is quite a low response rate – one problem was that despite it being emailed out twice a relatively low proportion (20-30%) of recipients opened the message. However the survey still provides some useful data and some interesting qualitative responses from individuals, whilst still raising a question about the response level.

The e-survey asked respondents to rate the main Destination Staffordshire activities. In terms of performance, the brochure, website and visitor map ranked highest, followed by the Taste scheme and Enjoy Card. The table below demonstrates the largely positive ratings but also reveals that many respondents were not aware of many of the activities which the DMP undertakes, in which case the activity is mostly not ranked as ‘very’ good. However, the Enjoy Card only started in 2009 and the Out & About in 2010 and thus are still comparatively new DMP products to be rated.

<table>
<thead>
<tr>
<th>Ratings of DMP Activities undertaken</th>
<th>Very Good</th>
<th>Good</th>
<th>Average</th>
<th>Poor</th>
<th>Very Poor</th>
<th>Not Aware</th>
<th>Base</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enjoy Staffordshire Brochure</td>
<td>35%</td>
<td>49%</td>
<td>14%</td>
<td>-</td>
<td>-</td>
<td>2%</td>
<td>(49)</td>
</tr>
<tr>
<td>Enjoy Staffordshire Website</td>
<td>25%</td>
<td>42%</td>
<td>27%</td>
<td>4%</td>
<td>-</td>
<td>2%</td>
<td>(48)</td>
</tr>
<tr>
<td>Visitor Map</td>
<td>17%</td>
<td>53%</td>
<td>6%</td>
<td>4%</td>
<td>2%</td>
<td>17%</td>
<td>(47)</td>
</tr>
<tr>
<td>Taste of Staffordshire scheme, competitions and publications</td>
<td>11%</td>
<td>52%</td>
<td>20%</td>
<td>7%</td>
<td>-</td>
<td>9%</td>
<td>(44)</td>
</tr>
<tr>
<td>Enjoy Card</td>
<td>11%</td>
<td>30%</td>
<td>23%</td>
<td>15%</td>
<td>2%</td>
<td>19%</td>
<td>(47)</td>
</tr>
<tr>
<td>Representing tourism businesses interest</td>
<td>4%</td>
<td>44%</td>
<td>22%</td>
<td>7%</td>
<td>7%</td>
<td>16%</td>
<td>(45)</td>
</tr>
<tr>
<td>Advertising campaigns</td>
<td>4%</td>
<td>39%</td>
<td>30%</td>
<td>9%</td>
<td>-</td>
<td>17%</td>
<td>(46)</td>
</tr>
<tr>
<td>Out &amp; About Newspaper</td>
<td>5%</td>
<td>30%</td>
<td>16%</td>
<td>5%</td>
<td>2%</td>
<td>40%</td>
<td>(43)</td>
</tr>
</tbody>
</table>

19 The full e-survey report is contained in the companion appendices volume.
Following on from the rating of the activities undertaken, respondents were then asked to rank the top 5 most important activities that, in their opinion, are undertaken by Destination Staffordshire. In order, they are:

1. Website
2. Brochure and campaign
3. Advertising Campaigns (though fairly moderately rated in survey)
4. Represent Business interests (though advocacy & lobbying not rated highly in survey and 53% unaware of this activity)
5. Visitor map (rated highly in e-survey)

This gives some reassurance that the DMP is rated as performing well in the activities thought by respondents to be most important – but that there is also room for improving the ratings, particularly for advertising campaigns and representing tourism business interests.

Views on the general visitor proposition “For Culture, Nature and Adventure Staffordshire has it all” were generally positive. Most felt it was an effective way of encompassing the very varied offer that Staffordshire has – which is recognised to be a significant challenge. “It’s a strong proposition – seems to cover all bases and encompass the offering.” Some people appreciated it more than at the beginning of its life. However some felt the order of the three words should be changed to Adventure, Nature, Culture. Others thought the proposition needs to be refreshed or sharpened up. There were a significant number of comments about it being too vague, that it could be applied to almost anywhere and that it needs to be used to emphasise the distinctive Staffordshire offer, especially on the website. “It’s lost its way slightly and needs to be looked at again – review how it’s applied and sharpen it up.” And “it’s like ‘something for everyone’ which is weak. What is Staffordshire actually famous for – be more specific –
what does it mean in practice for you or for this time of year.” Another suggestion was: “It works well, but there are no ‘tools’ created to use it, to cascade the concept down to businesses to use it. What does it really mean? Need a marketing workshop to help businesses to use it.”

There were also various remarks about ‘Culture’ being all things to all people and what did it really mean to the potential visitor? Did it really mean heritage for instance? Some people also thought there should be more engagement with organisations and products representing the ‘Culture’ offer in order to help with this and make it more tangible for visitors. One well known historian felt that the heritage offer was far more outstanding and more obvious for visitors. The descriptor of the Staffordshire offer was “unique industrial heritage, a rich cultural heritage and stunning landscapes” in 2005 when the DMP was first set up (see section 1.1).

One additional specific issue was that gardens are included under ‘Nature’ and the nature offer then appears in publications too biased towards ‘manicured gardens’ and not wild places and wildlife. Such useful comments would suggest there is room for clear presentation and personalisation of the wide Staffordshire “offer” of nature, wildlife, great gardens and landscape.

The strapline ‘Open up a world of possibilities’ attracted limited comments. Consultees tended to understand the thinking behind it - as a way of encouraging people to explore - but some queried whether it actually means anything in practice and several acknowledged how difficult it is to find a strapline which encompasses the offer of a county as diverse as Staffordshire but which is also sufficiently punchy and distinctive.

Consultees were not specifically asked their views about the logo itself but there were some less positive unprompted comments: “I can’t actually see what it is meant to be”, “it doesn’t help us”. The e-survey also found relatively positive views about the marketing themes and propositions used by Destination Staffordshire. Respondents were slightly happier with the Culture, Nature and Adventure theme (41%) than the World of Possibilities (37%). About 20% said they didn’t know matched by roughly the same who declared themselves “neutral”. This could reflect non-members being unaware of the theme or simply people not feeling able to judge marketing propositions. If they are either neutral or unaware of it (but working in the Staffordshire tourism industry) this may indicate that its impact is not as significant as may be thought?

See table below:

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20 The heritage tourism impact data in Chapter 2 gives an indication of the financial importance of the heritage sector
21 It is noted that the new Staffordshire Peak District 2011 brochure uses “The Possibilities are endless”
Views on the visual imagery used in DMP marketing were not specifically sought but several consultees volunteered unprompted views, both positive and negative. The illustration used on the front cover of the last few guides attracted attention - some liked it and appreciated how it is used to present Staffordshire’s mixed offer.

“I like it – it encompasses everything Staffs has to offer and introduces a fun element.”

It was thought to be easily recognisable (although it must be noted that these are insider views who know Staffordshire). However many expressed an unprompted preference for a photographic image, which they said would have more impact, sit better alongside other guides and have more impact. This was also picked up in impromptu conversations at the tourism conference, especially referring to the opportunities of using Peak District and the Hoard visual images.

“The bitty thing on the front cover is not as good as a really good photo. It’s difficult to pull off selling the whole county and the contrasts – Alton Towers alongside the nature and peace.”

“the front cover reminds me of the Lloyds Bank adverts”

“I still don’t like the cover – photographic one would be better.”

“On the shelf against other guides it looks a bit odd.”

“I’m not sure anyone would know it was meant to be Staffordshire. Have we ever done any market research on it to see if visitors like it?”

“It doesn’t work very well on the website – just looks a bit confusing”.
Lastly the e-survey asked about the future. Given that Destination Staffordshire will lose some of its funding, due to public sector spending cuts, and the challenging economic situation, respondents were asked their views on how tourism within Staffordshire should be led in the future.

- 68% felt that a Staffordshire wide tourism body will be needed in the future
- 60% would like to be involved with a local/district tourism group
- 61% would like to influence the organisation by feeding in comments on specific issues
- If Destination Staffordshire was no longer in existence, 62% of businesses felt they would have to promote their businesses themselves

3.2 Destination Staffordshire Key Performance Indicators

The Staffordshire DMP set itself some targets when it began its 2008-2011 programme. These KPIs were the first it had and to some degree were not set within any scientific framework. As such it utilised much of the activity that had gone before, such as the Short Breaks campaign running since 1993 as well as starting off with new targets for membership which was new.

It is however, a brave and determined attempt to self-critique and measure its impact and return on investment. It is important to stress that these KPIs are measured against the DMP team budget and outputs and does not include expenditure of other partners in tourism outside that budget.

Key indicators are therefore shown here in the next table together with explanatory comments from both the DMP team itself and observations from the consultants.
<table>
<thead>
<tr>
<th>Activity</th>
<th>2008/9</th>
<th>2009/10</th>
<th>Target</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership (including corporate)</td>
<td>462</td>
<td>381</td>
<td>485</td>
<td>The decline in membership since 2008/9 is mainly due to the restructure of the membership offer which changed during the latter half of 2009 when a fee was introduced. The level of membership in 2009/10 reflects the active participation in key campaigns by members. The current membership also includes those businesses who already contribute to the existing Conference Bureau. New arrangements with the Peak District which are good for members paradoxically may also impact adversely on DMP membership in the future if they join the PD?</td>
</tr>
<tr>
<td>Marketing &amp; Branding – Short Breaks enquiries</td>
<td>46,513</td>
<td>50,641</td>
<td>55,000</td>
<td>A broader-based advertising campaign for the Enjoy brochure should help in achieving target levels in 2011, including digital marketing</td>
</tr>
<tr>
<td>PR</td>
<td></td>
<td></td>
<td></td>
<td>The principal activities had more of a regional or local focus and not having a national news hook has proved challenging. The high levels in Q2 (2008/9) includes coverage in the Daily Mirror of a Seal/Thrill Hopper Promotion, which has skewed the figures. Some national coverage, particularly through the Guardian, was achieved in the last quarter. Consultant comment: These PR figures do not include the value of Stoke-on-Trent’s own PR contracted activity as they are paid for separately by Stoke-on-Trent Tourism. But in future it would be helpful to put them regularly into the overall performance data in order to give a more holistic picture of what overall tourism PR is contributing. Current Stoke on Trent PR for 2010-11 is estimated at around £250,000 AEV. In addition, PR investment by the major attractions and their outputs would also add valuable information to the overall picture and an indication of the ration between private and sector investment in marketing and PR. The Hoard provided a major national PR hook but was largely handled outside the DMP’s PR activity and so is not included here.</td>
</tr>
<tr>
<td>Advertising equiv value</td>
<td>£403,202</td>
<td>£309,142</td>
<td>£500,000 annual</td>
<td></td>
</tr>
<tr>
<td>PR coverage estimated value equivalent</td>
<td>£1,209,583</td>
<td>£890,864</td>
<td>£1,500,000 annual</td>
<td></td>
</tr>
<tr>
<td>Circulation</td>
<td>50,480,624</td>
<td>26,324,672</td>
<td>55,000,000 annual</td>
<td></td>
</tr>
<tr>
<td>readership [estimated]</td>
<td>142,638,431</td>
<td>51,867,186</td>
<td>150,000,000 annual</td>
<td></td>
</tr>
<tr>
<td>Website</td>
<td></td>
<td></td>
<td></td>
<td>The rise in visits to the web site could be attributed to the Enjoy card (37k). The number of pages viewed has decreased and could be due to the incoming traffic generated by the Enjoy card using the site for a single purpose rather than general browsing. However, overall website hit performance has risen substantially in 2010-11.</td>
</tr>
<tr>
<td>No of Visits</td>
<td>436,869</td>
<td>647,645</td>
<td>£500,000 annual</td>
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</tr>
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<td>2,174,819</td>
<td>2,750,000</td>
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<td>Average pages per visit</td>
<td>6.09</td>
<td>3.36</td>
<td>5.5</td>
<td></td>
</tr>
<tr>
<td>Events &amp; Festivals</td>
<td></td>
<td></td>
<td></td>
<td>There is an unaccounted for significant drop from 08/09 levels, and may underline the requirement for an events strategy for the County. The performance</td>
</tr>
<tr>
<td>Web Visits</td>
<td>142,980</td>
<td>112,466</td>
<td>100,000</td>
<td></td>
</tr>
</tbody>
</table>
3.3 What didn’t work as well or needs to be improved?

Views about whether the DMP had specific weaknesses varied - a handful felt there were no serious weaknesses “Given the context everyone does incredibly well”. But as might be expected most people had some constructive criticisms and often suggestions as to how they could be addressed.

In terms of how the partnership works there were a scattering of negative comments. Some respondents felt:

“Key figures are quite autocratic and can be a bit unbending.”

In contrast some wanted less discussion and more executive action:

“It’s overly administrative – with un-inspirational board meetings which are too long with too many people wanting to say too many things. It needs to be more decision-based and executive.”

“DMP Meetings are not always that productive, you don’t always get much of a real say. Still seems a bit too local authority focused, although it’s good there is stronger private sector now.”

“The Board is too big – you can’t expect to get rapid decisions made with that number of people. What’s needed is a very small strategy group sitting above it so that we don’t spend Board time mixing strategic issues up with more operational ones and it would be more effective”
There was a slight concern of those who knew, about the move of the DMP from the heart of economic development at the County Council into the Culture, Leisure and countryside department and whether the value of tourism would still be understood and also if the ‘language’ and aspirations would clash in any way. This was not exclusively of concern to the private sector.

Some stakeholders see the DMP as too dominated by large attractions and private sector players. There were equally comments from some of the private sector who felt the public sector were too dominant. This probably means the balance is about right. Those representing the views of smaller businesses felt their views were not heard sufficiently. Some local authorities also had concerns:

“We have limited influence. What has it done for my area – I need to demonstrate the benefits better – e.g. booking stats. I’m not sure if this is perception or reality but some districts feel removed from the decision making.”

“The DMP is opaque and difficult to get into/connect with. Especially for small organisations.”

Specifically however there seems to be scope for building closer links with some larger players including the National Trust, Cannock Chase AONB, the Forestry Commission and the National Forest. There were also several comments about imbalances between different parts of the county – the balance between north and south, or Stoke-on-Trent and the county, or about how some of the southern districts are looking to relationships with Birmingham and other southerly partners and the emerging LEP for that area.

Some stakeholders felt the DMP should take a more strategic approach (which of course this study is hopefully addressing). For example:

“DS is not sufficiently able to take a strategic view – what do we want to achieve at a county level – what sort of attractions and improvements do we need? It’s too funding-led for projects – we need a more strategic approach – what is needed and what are the priorities.”

“The DMP should concentrate on the big strategic issues and lobby for greater investment”

This view tended to be shared by some of the major bodies/players who were perhaps more involved, closer to strategic issues, and rather less concerned about day to day operational issues.

A few people felt that there was still an incomplete commitment to the DMP by some Districts i.e. that some district authorities were still “paddling their own boats” when there was much greater impact
through working together and that fragmentation was still sometimes an obstacle to many areas of progress.

There were several comments about the DMP’s communications both in style and content:

“The message about the benefits of membership is not getting across.”

“I still feel there’s a bit of a lack of communication. It could link more with local authority tourism officers who have the relationships with tourism businesses – but little is made of this opportunity – e.g. we could help with a membership drive. We need to engage a wider range of businesses – especially retail and food and drink.”

“The e-newsletter could do with improvement. Communications to members are a bit clunky and rushed – they need a bit more thought – communications are very important.”

“Things are a bit slapdash at times; daresay they are all under pressure”.

A range of more specific criticisms were made via the consultations and the e-survey. The comments below are indicative and most points were made by more than one individual:

“The research group is good but we could have used data more – there’s lots more detail from the business survey – we should spend more time on it and its implications.”

“The overly generic branding – it’s not captured the essence of the county. Not enough was made of the Staffordshire Hoard – we were slow to react as it became over politicised and hijacked. Scope to make more of it now.”

“The website offer is OK but not that sophisticated – very search and database driven – little on experiences or editorial – needs more propositions. But it’s only a small team.”

“We’ve struggled with data ownership across the county – we’ve lost opportunities to share across districts which has been a fly in the ointment at times – especially re e-marketing – would achieve more if we pooled out info and there’d be efficiencies.”

“We need a more proactive approach to the Enjoy card especially through e-marketing. We’ve lost a bit of momentum. People need reminding periodically that they have it – do an offer of the month/week.”

“Businesses aren’t getting enough bookings through official sites. Need to try to do more with national commercial websites e.g. opodo, trip adviser, last minute, late rooms – so why would
they be member? Destinations are going to have to work harder with national brands and sell additional benefits – e.g. Taste, enjoy card – enable users to review businesses.”

“It could be done better. Group business needs to be discussed earlier – plan the whole calendar earlier. Use social networking and email campaigns better – use email newsletters which are more cost effective.”

“Duplication of materials between Stoke-on-Trent and Staffs is a problem – we could choose to go in one and not the other but want to support both. If the teams got together more businesses could make savings and not have to choose. They’re doing things which are too similar.”

“DMS system – it’s been a lot of investment but what is it achieving? There seem to be few online bookings – we need to take another look – would late rooms be better –should we continue to invest?”

“The website search function/key words really doesn’t work well – and events listed seem only to be very narrow and don’t reflect the huge variety and spread of things going on”

“Not been as successful in engaging with and maximising cultural and heritage assets, particularly the County Council’s assets such as museums, galleries and Shugborough, these tend to do their own thing with more community focus.”

“Need to do more to capitalise on 2012.”

“We need to market ourselves as a business tourism destination – do more research into what can be done and raise the profile.”

“Need more research on consumer experience – real visitor research – how relevant is ‘Staffordshire’ to the visitor experience?”

“The theme groups have been patchy – not always had reports back to the Board – some streamlining is in progress. A task and finish group might be better - some have lost direction.”

“There has not really been any success in reducing the range of local authority guides, there seem a lot of brochures still in production, we have not succeeded in bringing all publications under one umbrella. The local guides do not reflect any branding or reference to the county image.”

“Suppliers remain in meetings when we are discussing their performance and work. This means we often can’t say what we would really like to and could easily be remedied.”
Other areas which were constructively critiqued include:

- Scope to bring some of the activities outsourced back ‘in house’ – to use more of the collective teams’ skills and save resources.
- Demonstrating return on investment (ROI) needs to be more robust
- Exhibitions – good stands but not enough is made of the opportunity to collect contacts and leads or “work” exhibition presence more productively

A few extra comments from the e-survey addressed additional issues:

“Effective PR is a very important element of destination marketing...PR would rank in my TOP 5.”

“More promotion of small attractions packaged as a reason to visit Staffordshire - i.e: features of smaller towns in close proximity, not just Alton Towers and Wedgwood.”

“I should like DS to carry out extensive research into how other counties run Open Studios as they almost all seem very much better supported by artists and very much higher profile than our relatively young scheme.”

“We need a comprehensive look at signage to attractions throughout the county”

### 3.3 Conclusions and issues arising

On balance there was a **broad, overall consensus that**:

(i) the DMP is doing a good job, generally in all the right activity areas.

(ii) There is room for improvement, development and refinement in some of these areas.

**The most important strategic issues for the DMP in the future focus on the following:**

1. The need for political, partner and industry support and commitment, in particular a real understanding of the value of the visitor economy to Staffordshire and the value the DMP adds:

2. Better articulate the visitor ‘offer’ of the County (leisure & business) by refining the existing brand proposition(s) to extend the personal appeal to visitors, through differentiated and compelling reasons to visit

3. Market from strengths, stress distinctive products, location and brands

4. Sustain and strengthen the co-ordination of the DMP to engender real partnership working and strong communications with sector, whilst avoiding bureaucracy

5. Grow membership across the whole county to achieve more balance including small businesses and larger key partners and deliver more through local engagement.
6. Grow productive partnerships and explore new income streams
7. Continue quality research and data collection and use it to inform actions and monitoring
4. STRATEGIC AND SPECIFIC OPPORTUNITIES

During the consultations and the consultants’ own research, views were sought on any additional activities which Destination Staffordshire might or should be able to address, new opportunities which could be productively grasped and also potential constraints, challenges or threats. This section considers all these external influences and opportunities. Building on this, Destination Staffordshire’s emerging priorities are further considered – incorporating the input from stakeholders at the workshop as well as other researched background information and intelligence.

4.1 Potential for new DMP activities or roles

A good proportion of respondents suggested that now is not the time for the DMP to take on additional activities or an enhanced role, given the funding challenges. Several people suggested consolidating existing activities:

“Concentrate on getting the message across – businesses need to understand ‘what’s in it for me’."

“Refocus on core activities and maintain relationships.”

“Nothing new, but just do the important things really well”

A good number suggested that the main focus should be on building relationships with the new LEP(s):

“LEPs- we’ve got to be an important part of that. We must be very proactive – putting things forward and driving things on the projects we support. There’s not much money so need to find new ways of delivering things.”

“We need to be major partners as it develops.”

Some suggestions and questions about efficiencies came forward:

“Review the working groups and which are needed – Slim them down and make them stronger.”

“We don’t always know what print is being done by whom and targeted at what markets. If everyone received the same information we could be more targeted and perhaps cut out some duplication.”

“We don’t seem to be clear about what Stoke-on-Trent does and what Staffordshire does.”
“We should overcome any issues around sharing data and thus make a bigger impact on more people together.”

Comments on external issues and developments which need to be borne in mind included:

- The environmental quality assurance scheme and any potential changes
- The Staffordshire Hoard
- The Staffordshire Moorlands/Churnet Valley Living Landscapes Project
- The Peak District’s status as one of Visit England’s ‘attract brands’

Comments about the need for additional activity included:

“Make the KPIs clearer and stronger.”

“Business tourism … promotion of Staffs for location and accessibility.”

“More resources into mobile phone technology.”

“Food and drink – more membership recruitment in this area as many of best offers are not included and only members are promoted via Taste.”


“We should be looking at sponsorship and affinity relationships with other brands and coming up with good offers”

“It would be good to discuss visitor dispersal around the area e.g. Chasewater, NMA, National Forest. DMP just tries to get people into Staffordshire rather than working out best locations within Staffs.”

“More should be done to make use of the National Park, AONB, National Forest as beautiful landscapes, and the canal network. Promote the quality landscape of Staffordshire - it is very much an outdoor county. The rural overlaps with Derbyshire, into the Peak District should be maximised.”

“We need to raise or address the issues which are holding small businesses back (e.g. red tape relating to employing staff). Maybe have more small businesses on the Board too.”

“We would be interested in looking at scope for a visitor payback scheme.”

“We need more focus on history and heritage – it’s one of GB’s strongest assets so identify what role Staffs has played in the country’s history and promote this.”
“Make more of walks, cycling, canal towpaths.”

“Social networking – could do more of this as very cost effective way to talk to people. It plays to strengths of individualism. There’s something very right about promoting tourism this way.”

“Get more personal and conversational with marketing messages – involve people in the story more. Use people stories, recommendations, film clips, personalise the marketing.”

“The DMP should make better links with the surrounding areas.”

“Transportation is an issue – getting around from attraction to attraction once in the county – it would be good to have more direct public transport for leisure visitors.”

“Make more of the museums, heritage, Staffordshire Hoard – it reflects that Staffs was not a ‘Dark Age’ county then and is an enlightened place now. Lichfield Gospels, Tamworth Castle, capital of Mercia – there is opportunity to grow the Anglo Saxon heritage credentials to appeal to different markets from the family theme parks/days out.”

“A local campaign to increase pride in the county and raise enthusiasm e.g. target local taxi drivers – boost understanding and pride.”

“Make more of group travel and packages, more thematic breaks – a dedicated groups campaign. Whilst there is a strong family product offer, I feel more could be done for older/empty nesters.”

Business support was identified by several people as a key issue due to imminent changes in the system:

“Business Link is going – so there will be a need for more business support in future.”

“Training – we could beef it up more – it’s a bit ad hoc – raise the profile of training as a member benefit – could formalise and make it more of a programme and sell it more effectively.”

4.2 New drivers to grow tourism

Although it is still early days for all Local Enterprise Partnerships (and there is generally a rather low expectation of any funding from the Regional Growth Fund by most LEPs), the existence of the DS partnership in itself offers considerable scope to present the business case for the Staffordshire and Stoke-on-Trent visitor economy across a wider spectrum of industry and senior players and politicians via the LEP. Despite Staffordshire’s engagement in tourism over many years, there is undoubtedly a continuing need to articulate both the economic case for support as well as the social, business and broad educational outcomes of the sector. External funding that has come into Staffordshire as a result of visitor-related projects, from large scale HLF and AWM investment at Wedgwood to private sector
investment at Trentham and the National Brewing Museum, to HLF/BLF investment in parks, nature reserves and the environment and the Landscape Partnership/Living Landscapes Staffordshire Wildlife project in the north of the county, has produced and is producing considerable and substantial improvement to the visitor product and infrastructure as well as to the quality of life for residents of the county. The LEP should take due cognisance of the impact of this and how it also improves the inward investment opportunities and the awareness and perception of the county, as mentioned already in this narrative. It is an opportunity for the DMP to demonstrate the evident and progressive improvement of the County as a whole and how perceptions could be altered even more favourably by agreeing key messages, key aims and objectives across more than just the DMP.

The DMP has begun to experiment with social media and digital marketing with some early evaluation indicating a positive response. Given that almost all of the big players in the digital infrastructure such as Google, Microsoft and Nokia, are investing in mobile technology and its interaction with consumers and businesses, there is no doubt that trends are telling us that this is the future. Smartphones and other ambient technology devices of all kinds are increasingly driving decision-making across the spectrum: where to eat, where to shop, where to get the best deals, how to find somewhere\textsuperscript{22}, what to do and where to stay. Recommendations and peer approval, downloaded guides on mobile readers and constant information can mean that everyone is a little overwhelmed by much of this - so the smart money is on those businesses and organisations that can stand out by clearly offering value and distinctiveness. Staffordshire can do both but it still lacks the ‘cool’ factor for many markets, not just the younger Cosmopolitans. However, some Staffordshire businesses and people like Emma Bridgewater and her husband Matthew Rice, certainly do have the all important ‘cool’ factor and using a mixture of personality and product such as is working for her and her company, is an example of how to maximise an emerging ‘brand’ or reinvent a traditional sector in areas like the Potteries.

It is still early days however, in knowing what the best ‘messages’ or indeed ‘products’ are to present to the digital recipient and through which digital media. The spectrum is vast: photographs, incentives, amusing anecdotes, competitions, money saving offers, attraction offers, accommodation and attractions, simple messages, or just ‘Enjoy Staffordshire’. There is no doubt that the world of social media is a huge phenomenon and many an academic thesis is being generated about its impact for businesses – but the truth is there is conflicting evidence about what works best. Certainly in the

\textsuperscript{22} Resulting also in a concomitant general loss of geographic knowledge of the UK
consultations there was interest in it but consultees were keen to see how it really affected the bottom line for businesses: whereas one can measure online bookings and the effect of, say, LastMinute.com or Expedia offers which come direct into your inbox and give you the ‘call to action’ and the opportunity to buy there and then, it may be more difficult to track what 9 million ‘impressions’ online may actually produce in direct conversions to visits or bookings. This again leads us into research recommendations where some further investigation of what type of social media intervention has most effect in converting interest into action will pay dividends in both the short and longer term. Given the reduced funding for DMP activity it is vital that the best value actions in this area are pursued.

There are some specific opportunities, unique to Staffordshire which can help differentiate the visitor proposition.

At the moment, the Staffordshire Hoard opportunities have not been something in which the DMP has had an active role, above and beyond the overall marketing opportunity. It is arguable that the discovery of and subsequent PR for the Hoard has done more for the county’s awareness raising than any other single thing in the past year or so - just as the Müller yoghurt TV adverts have done more to raise the public consciousness of the county of Shropshire. The recent launch of the new and very attractive Staffordshire Hoard website and the 2011 Staffordshire Hoard on Tour programme across the county and Birmingham offers even more opportunities for the DMP and its members to benefit from and promote this outstanding and unique chance for the county to put itself into everyone’s mental travel map.

There is no doubt that it offers all businesses a piece of the action and that the DMP has the chance to broker and benefit too: merchandise and indeed opportunities to create merchandise ‘inspired by’ and to use the official branding are all available and the DMP should position itself as the champion for its members to understand quickly what they can and cannot do, what commercial opportunities exist and how to ensure that visitors are fully aware of the tour and all its offshoot activities. Other negotiations with other well known brands are still under wraps but once announced will give further unique options.

The DMP, especially now sitting in a different unit in the Council, must ensure it is IN the frame to work actively with the Museum Service to maximise the tourism benefits and to ensure The Mercian Trail is presented attractively and made easy for visitors to enjoy.

Royal Weddings and Jubilees enable the ‘Made in Staffordshire’ factor to stand out and in particular to find ways of working particularly with the Make it Stoke-on-Trent Staffordshire current branding – since

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23 Evaluation of the DS first digital marketing in 2010
there is considerable media interest in what the Potteries have made for previous Royal Weddings and other occasions. This may not be a lasting preoccupation beyond 2012 – the Queen’s Diamond Jubilee – but it is a wonderful chance once again to put Staffordshire in front of consumers – via a press desperate for every and any story connected with Royalty – especially the foreign press, who have been participating in what has been named ‘The Royal Tour of Stoke-on-Trent’. The British Ceramics Biennale (BCB) must offer an equally powerful chance to capitalise on this level of interest. The DMP marketing, press and PR efforts must be aligned to showcase this and the Hoard and the DMP website should be reflecting this and other photographic gems to reposition awareness and product in the mind of the ‘possible’ visitor.

Staffordshire specific opportunities, beyond the Hoard, for those market segments most likely to respond to distinctive heritage experiences must surely include those which are drawn from ancient customs: many such have died out to a large degree in many parts of Britain and are thus even more valuable as part of the Staffordshire offer\(^{24}\). Just as the Hoard caught the whole nation’s imagination – for its sheer beauty and the unlikely circumstances of its finding, so can the authentic and local character of parts of Staffordshire present micro-moments for the imagination of visitors, both current and potential. Unspoilt by commercialism, events such as Well Dressing in parts of the County and the ancient, almost pre-historic in origin Abbots Bromley Horn Dance, can offer insights into a world we have lost. And yes, whilst there may be some issues around capacity and timing, the DMP has the opportunity to be smart in the way it uses such distinctive and genuine events and festivals to position the county – that has a ‘no perception’ factor with many as discussed earlier - as a county with an identity and authentic history pre-dating our modern world, which can still be glimpsed. At the moment these are not registering much on the online/tourism radar and tend to be lumped in with general ‘events’ rather than offering a distinctive view into the County’s personality. Yet again the online resources and opportunity for the DMP to tell a different story – alongside its hugely important ‘Thrills and spills’ – to different market segments are there for the taking. The Festivals and Events Strategy is well placed to give a lead to DMP activity here and there is no doubt at all that PR is the key and that online is the opportunity.

The **National Memorial Arboretum** has increased its visitor numbers by over 100% in the past year. As described above, the reasons for its growth are not always of the positive kind, but nonetheless the

\(^{24}\) Compare the huge range of popularity of current TV series on prehistory, archaeology and heritage of the UK
opportunity for Destination Staffordshire to increase the public’s awareness of where the Arboretum actually is and associate its values with the county and its products, is enormous. There is opportunity to build short breaks aimed at the staying visitor coming from a distance and to highlight other opportunities and experiences that might be relevant and that they might enjoy – especially gardens, walks, literature and religious and other heritage sites. The theme of “memory”, family and remembrance could be usefully considered in this connection. One has only to consider how the town of (Royal) Wootton Bassett has become a household name under related circumstances.

The Staffordshire Environmental Quality Mark (SEQM) which was launched at the end of March 2011 is also a special opportunity. Its call to ‘Make visitors fall in love with Staffordshire’ will hopefully encourage more businesses to join the nineteen or so already registered at the time of writing. But it should be seen as cross cutting activity in all sectors and made inviting and attractive to visitors in ways that avoid the usual “worthy but dull” manifestation of sustainability. Selling up the benefits to visitors is as important as selling them to businesses to take part.

As part of the e-survey members were asked how important they thought any special interests or opportunities are for tourism in Staffordshire. Overall, special interest/opportunities were felt to be very important to the tourism product in the county.

<table>
<thead>
<tr>
<th>Importance of special interests or opportunities</th>
<th>Very Important</th>
<th>Important</th>
<th>Neither</th>
<th>Not Important</th>
<th>Not at all Important</th>
<th>Don’t Know</th>
<th>Base</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staffordshire Hoard</td>
<td>47%</td>
<td>34%</td>
<td>9%</td>
<td>2%</td>
<td>2%</td>
<td>6%</td>
<td>(47)</td>
</tr>
<tr>
<td>Ceramics/Design/Biennale</td>
<td>32%</td>
<td>51%</td>
<td>11%</td>
<td>-</td>
<td>-</td>
<td>6%</td>
<td>(47)</td>
</tr>
<tr>
<td>Industrial Heritage</td>
<td>30%</td>
<td>53%</td>
<td>13%</td>
<td>-</td>
<td>-</td>
<td>4%</td>
<td>(47)</td>
</tr>
<tr>
<td>Food &amp; Drink</td>
<td>31%</td>
<td>38%</td>
<td>23%</td>
<td>6%</td>
<td>-</td>
<td>2%</td>
<td>(48)</td>
</tr>
<tr>
<td>Well Dressing/Traditional Events</td>
<td>10%</td>
<td>50%</td>
<td>15%</td>
<td>17%</td>
<td>2%</td>
<td>6%</td>
<td>(48)</td>
</tr>
<tr>
<td>2012 Olympics</td>
<td>13%</td>
<td>25%</td>
<td>25%</td>
<td>19%</td>
<td>13%</td>
<td>6%</td>
<td>(48)</td>
</tr>
<tr>
<td>Pilgrimage Tourism/Churches</td>
<td>4%</td>
<td>33%</td>
<td>33%</td>
<td>21%</td>
<td>4%</td>
<td>4%</td>
<td>(48)</td>
</tr>
<tr>
<td>Genealogy Tourism</td>
<td>4%</td>
<td>21%</td>
<td>38%</td>
<td>17%</td>
<td>6%</td>
<td>13%</td>
<td>(47)</td>
</tr>
</tbody>
</table>

Staffordshire’s Industrial Heritage (83%), the Ceramics/Design/Biennale (83%) and the Staffordshire Hoard (81%) on a combined basis were all thought to be important/very important to the County. Food
and drink scored a combined important/very important of 69% and Well Dressing/Traditional Events 60%, bearing out the potential described above. We concur that the Olympics, whilst a short lived obsession in relative terms, will not repay too much effort in the long term when there is so much more the DMP can exploit of greater and more sustainable relevance to Staffordshire’s product.

Some of the specific opportunities described above, in tandem with the new Festivals & Events Strategic Framework offer considerable opportunity for the Staffordshire DMP to encourage and enable the creation of products which increase the overnight staying visitor markets both domestic and overseas as well as the day visitor.

Marketing priorities
Members were asked to choose which market sector Destination Staffordshire should focus its marketing on.

- 81% of members felt that the organisation should focus on the domestic overnight visitor, whilst 2 thirds (66%) felt the domestic day visitor important to Staffordshire.
- Business Tourism was not felt to be as important as other sectors by members with just under half (47%) citing this as a key focus for the organisation. However, business tourism facilities may not be available at many locations and therefore this figure is inevitably lower and reinforces the need for greater awareness and investigation.

4.3 Constraints, challenges and threats
Funding was overwhelmingly identified as the most significant challenge facing Destination Staffordshire in the near future. There was an interesting balance as several private sector respondents suggested that more funding would be needed from the public sector and several public sector partners suggested businesses would need to contribute more through various routes. The need to make the most of the LEPs and identify funding through them was identified by many.

“We need to aim for more sponsorship.”

“Engaging with the LEP – need to work in partnership – for funding and programmes and ensure there’s no duplication.”

“How do we respond to cuts – need to look at this more seriously and move fast. Need to balance needs of Stoke-on-Trent and the rest of the county – particularly with the new LEPs and how the DMP fits with it.”
A major threat is the loss of key partners - there were many comments about the need to try to retain both public and private sector partners on board during a time of cuts and financial pressures. A key issue therefore is proving the value of the DMP and the overall economic importance of tourism.

“It risks fragmentation in the current state of flux between RDAs and LEPs. We’re on dangerous ground. Need to clarify where it sits and what it means – need strong communication about purpose.”

“Engagement from LAs will be a challenge and how to keep the private sector on board and engaged. Need to demonstrate performance and value for money. Tourism is a growth sector but it often bears cuts. We need to be more self-sustaining.”

“Making the most of opportunities – new activities and angles given the shrinking resources. There are fewer people on the ground e.g. TICs and tourism officers.”

“Getting more businesses involved. Public sector to take more of a back seat in future – the offer is largely private – DMP to become more of an independent business. Will link to localism agenda.”

“Public sector need to let businesses lead and not push their own agenda so much”

“DMP needs strong strategic leadership when dealing with LEP”

Other threats identified included:

“Competition from other destinations. Branding – we need to keep up and focus on the strongest offer.”

“Getting people to recognise Staffordshire as a destination. We’re starting to build a sense of place and reputation. Need to capitalise on this and encourage more repeat visitors.”

“Olympics – not aware that we’re doing anything.”

“Communications – only 30% of people open the newsletter – need to be cleverer with this and put more effort in.”

Further strategic issues for the DMP emerging from this discussion include:

1. The need to simplify and focus KPIs
2. Prioritising DMP activity on what achieves most results and cut out peripheral activity when any budget cuts impact on work programme
3. Avoiding duplication – yet encouraging distinctiveness
5. PRIORITIES

5.1 Discussion of priorities

The main priorities emerging from the consultations which stakeholders feel the DMP should focus on were:

8. Continuing and sharpening up effective marketing activities
9. Demonstrating value for money to local authorities and members
10. Demonstrating the value of tourism economically to public sector funders
11. Working with the LEP(s)
12. Widening and strengthening membership
13. Identifying new ways of working which help address reduced funding and duplication
14. Securing new sources of funding and income generation

“We need to look beyond conventional funding – how to get businesses to contribute more.”
“The DMP business model may need to change in the future. The private sector can create growth and needs public sector help with them facilitating. At times feel they take the private sector for granted”
“We still need to raise profile of tourism and the economic value and rationale. Politicians need to take it more seriously. Tourism is still poorly understood.”
“Communications – maintaining and growing the presence to maintain members and confidence.”
“Far more emphasis and resource into quality online activity is a priority”

Partnership working within Staffordshire, overcoming any tensions, and also with neighbouring areas was also highlighted.

“Making sure everyone is working together to maximise effect. We’ll be losing jobs in the public and private sectors so there will be fewer people who need to do as much if not more. Keeping focus and holding things together.”
“We need to try to engage with non-members as well. Promote the conference to non-members.”
“Perhaps there’s scope for Birmingham’s new tourism organisation to work closely with DS staff.”
“The private sector can and should do more to help the DMP activities be more efficient.”

“Lichfield and Tamworth etc will always be part of Staffordshire and have a strong role within the DMP, even though they are to be part of the urban Birmingham/Solihull driver – Keep their attention with the Staffordshire DMP, not just be looking to the south to Birmingham”.

“Efficiency re budgets – more working with partners. Linking more between Stoke-on-Trent and Staffs – avoid duplication and work together more.”

“Stoke-on-Trent and Staffordshire need to get on together – the LEP may help. They can do more for tourism by collaborating”

Another key priority theme was being innovative and keeping up with technological advances.

“We need an online strategy.”

“The website could generate revenue – e.g. through affiliates – displaying availability through other engines and earning commission, plus other commercial opportunities.”

There was a strong focus on the DMP’s marketing activities and on ensuring activities are focused on priority markets. Successfully addressing the issue of promoting such a diverse county was mentioned by many.

“Building packages, offers, communications.”

“Marketing and PR are essential priorities. Especially high quality PR activity.”

“The website has to be constantly top of the class, and maintained to best effectiveness.”

“Continue to do what it does well – don’t mess with it. Raise profile of Staffs and keep refreshing and strengthening it.”

“We should do more to make the link with the Peak District as it is so well known but the style of the DMP brochure and website makes this harder”

“North and south of the county are so different we need a cleverer way of getting the messages across”

“Stronger business tourism profile – e.g. Telford have had success with business marketing recently.”

There were also mentions of specific issues of concern to particular partners. For example:

“I want to put cycling on the agenda soon – especially the need to identify more gateway points on the fringes of the National Park for people to park and cycle from into the NP.”
“Supporting businesses – identify their needs better and help provide training and business advice e.g. through partnerships with local colleges and agencies.”

“Becoming a greener destination – many businesses are ready and poised to go greener – we could do it much better and the markets are increasingly wanting it.”

“Quality of B&B provision – focus on the basics – what visitors find in reality and work with businesses to boost quality collectively.”

“Taste scheme – try to link to bigger businesses and try to get corporate sponsorship.”

“Do more with the group travel markets and build packages between venues.”

“Use the rural outdoor identity and seek to reinforce the rural nature of the county.”

The e-survey of businesses generated a large number of comments about what the DMP’s priorities should be. Simply attracting more visitors was the most mentioned priority. Other comments made included:

“Marketing Staffordshire bringing the various tourism businesses together to support each others’ businesses developing the regional domestic market”

“I don’t think they focus on International as much as they could. Help generate much needed income into the County by widening the use of the Enjoy Card and increasing the offers available with such card.”

“Think carefully about how they can maximise results whilst working with minimal budgets. Be brave! Don’t try to please all members, but bring the prospective customer to the very front of every activity they undertake - that way, they’ll please all members in the long run. Less self-promotion. More focus on tangible, impactful results e.g. fight hard for the destination to be in the minds of the domestic day tripper, bring footfall to our county (focus on the groups with the higher spend capability!). Sell our excellent central location and motorway links (particularly relevant for travel trade). Keep up the good work!”

“Keep us well and truly on the tourism map.”

“Keep raising the profile. Encourage and coordinate private sector initiatives. Provide a forum for different bodies to use. Liaise with neighbouring counties and bodies to get a strategic drive for the region.”

“Building up ideas of trip packages. i.e. Attractions of common interest and/or similar location. ‘Whilst you are here you could…..’”
“If DS really got its act together it might make a huge difference to ours and other accommodation providers business especially if it did something great for the winter.”
“Spend the limited funding on pure tourism activities, promotion and awareness projects. Training and food interest will not be the drivers to bring continual numbers of visitors to the area, stick to the core principals, spend money wisely not on peripheral activities but on raising and keeping awareness of the area in the public domain.”
“To look at overseas visitors coming into the area, offer new ideas for events, look at gathering information on what people actually want to see and attend, especially from overseas.”
“We need to continue to sell the county as a whole and not focus disproportionately on theme parks. This may require better connection between Stoke-on-Trent/Staffs moorlands/Peak District so guests see it as one county rather than 3 different holidays.”
“More promotion of the area, targeting people to stay in the area not just to pass through on their journey to some other holiday destination. Most of my customers have not realised there is so much to do in the area.”
“Help the small businesses not the big hotels.”
“Engagement with the businesses that are active in the county. Identify and work with tourism champions, cascade good practice, get the word out beyond the walls of the office building.”
“Increasing awareness of the area, looking at new marketing channels including looking towards the digital age. Apps are becoming more important in consumers lives and so attempts should be made to offer this service. Major events at various attractions throughout the year could help spread the word, with various destinations working together to other a package discount for incoming tourists. e.g. A heritage package: Railway, Ceramics, etc. Family Package: Trentham, Railway, etc...”

This work has also identified the need for more reliable occupancy data and the need to recruit more accommodation establishments to submit their data to make the statistics more robust. Similarly the lack of up to date visitor survey data hampers the industry’s understanding of current visitor profiles.

5.2 Priority issues to address
Integrating all these comments and issues alongside the views from section 3 enabled the identification of a list of priority issues that the DMP could address. These can be grouped under three main headings:
4. Marketing

5. Membership and Communication

6. Partnership and smarter ways of working

The March stakeholder workshop was an opportunity to rank each item’s importance – given that the DMP and partners will not be able to tackle everything at the same time. The issues to address are listed below under the three headings (and marketing sub headings) roughly in the order of importance as ranked by the workshop groups.

1. MARKETING

A. Brand ‘Hierarchy’ and Usage
   • How to balance the relationship between the ‘offer’ of Staffordshire the county and the well-known brands such as Alton Towers, Wedgwood, Drayton Manor, the Peak District, Trentham Gardens, etc
   • How to balance the marketing mix - focus on the most effective marketing methods including PR, social media, print and personal recommendations
   • Themes and straplines: Open Up a World of Possibilities. For Culture, Adventure, Nature – Staffordshire has it All – consider ways to refine and personalise for target markets

B. Priority Markets and messages: which to focus on and how to reach?
   • Increasing overnight stays
   • The day market and local visitors (Staffordshire and within an hour’s drive
   • Groups market
   • Business and conference tourism
   • Overseas marketing

C. Research, data and online tools
   • Integrated online plan or framework
   • Website: continuous development improvement in function, look and balance of info, user generated content ....
   • Website data and statistics, effectiveness and impact
   • Enrich future marketing intelligence e.g. qualitative as well as quantitative data
• Up to date visitor profile data and reliable occupancy data
• Investigate what we still don’t know e.g. non-visitors surveys
• Social media – how best to maximise for tourism growth
• Research brand/awareness/proposition e.g. focus group research outside county

2. MEMBERSHIP AND COMMUNICATION
• How to support and communicate better with busy small businesses
• Communications with members and partners - method/ style/ effectiveness of communications
• Expand membership – e.g. use incentives, PR, clarify benefits, new benefits, peer recommendation, ambassadors, survey non-members – consider how can this be enabled?
• How can small businesses get maximum benefit from DMP activity as well as large businesses with greater resources, financial and human? How can we increase engagement?
• New options for DMP Business support (current scheme ends this month)
• Broaden Taste of Staffordshire and clarify activities
• Resolve/clarify any online ‘bookability’ issues with Guestlink although this seems to be an issue with mixed opinions
• Encourage businesses to develop innovative products and experiences

3. PARTNERSHIP AND SMARTER WAYS OF WORKING
• Consider new ways to generate income/sponsorship. Are there options for more affinity options/commercial partners?
• Identify and Reduce any areas of duplication with partners, strengthening economies of scale and ploughing any savings into priority work areas
• Review theme/sub-group roles, given new tourism/economic world and priorities. Options for ‘task and finish’ groups?
• DMP organisation & style– is it too big and time consuming, or effective and manageable? Are there better ways to organise for the future?
• Should any new public money focus on improvement to ‘product’ or on attracting more markets?
• Relationships with Tourism Officers and Tourism Associations - more joint working, local engagement reaching more businesses.
Resolve any tensions: e.g. between rural/urban, private/public, county/district, Staffordshire/Stoke-on-Trent, 'big businesses/small, north/south

These priorities identified at the workshop by well over 30 informed stakeholders have helped steer the approach to the strategy, aims, objectives and recommendations that follow in the next sections, which also draw on the consultation discussions, analysis of data and the observations and experience of the consultancy team.
6. A REFOCUSED VISION, AIMS AND OBJECTIVES

The suggested refocused vision here is designed as a galvanising agent for both the DMP itself and for members and potential members to show that the DMP has moved forward in both its thinking and understanding of the business model it operates and of the business environment it works in.

In order to produce this very simple statement the original aim and objectives of the DMP as well as the theory of destination management organisations were revisited and backtracked against this review and its findings.

A Vision for the future

By 2014 Destination Staffordshire will be working with all relevant partners impacting on the visitor economy across boundaries and sectors, delivering value and quality through everything it does. It will be enabling all elements of the visitor economy, be they built, natural or cultural heritage, food and drink, attractions and accommodation, transport and infrastructure, to contribute together to the best possible experience for all visitors to Staffordshire. Its membership base will be inclusive of the wider visitor economy and empowered to deliver innovative and effective solutions for its own businesses and thus for visitors, keeping them for longer, with greater allegiance to the county and spending more in the area overall.

Overall aim

Our aim is simple. To harness the collective strengths of all Staffordshire businesses and organisations across the visitor economy to attract more visitors into and around the county, who will spend more time and money through their enjoyment of unique and compelling experiences and the highest standards of customer service.

Objectives

The Key Objectives of the Staffordshire DMP are:

6. To deliver the promise we make in our marketing
7. To attract more visitors by promoting and offering the right products to the right markets
8. To identify the best ways to keep those visitors happy and able to recommend us as a destination
9. To ensure that the money they spend is maximized and benefits the local industry
10. To communicate well with our members and partners and sustain a continuing process of improvement, best practice and sustainability
7. STRATEGIC APPROACH AND RECOMMENDATIONS

The foregoing chapters have set the context, both national and local, reviewed the performance of the DMP from a variety of perspectives against the performance data from independent research and national trends, highlighted specific and more generic opportunities and condensed all of this into the main priority areas to develop and improve at section 5.2 above. Those priorities now form the basis for the strategic approach and actions which follow and then inform the action plans at section 8.

1. Partnership Working

1.1 Working smarter and maximising diminishing resources. Identify and reduce any areas of duplication with partners especially Marketing, PR, and Online activity. This will undoubtedly create certain economies of scale although we do not underestimate the level of negotiation which is needed to bring it about. The need for any such smarter working must be seen as adding value, not an opportunity to cut costs but instead to plough any savings into priority work areas such as greater distribution of print or more PR/online work to push the key messages further: the de-duplication must specifically include the opportunity to review where district tourism officers can either pool time with the DMP and really take a lead on a specific task or topic (currently ‘themes’) as well as in their own geographic area and the DMP relationships with businesses within that area.

An even more radical option to be included in such a review is to consider the feasibility of all tourism officers coming “into” the formal DMP team on a part time, or even full time basis, but again the challenge of doing so may need longer time and effort, although the payback would be considerable. As a positive step there are already some developing discussions between Stoke-on-Trent and the DMP to see where smarter working could be productive.

Review outsourcing policy and identify savings and actions that could be brought back in house or for others to lead, which may include officers or organisations from the broader cultural economy and directorate. The DMP executive should also restructure, where possible, their working patterns to maximise effort focused on those activities producing most impact. Cost benefit analysis may show that delegating some activities to the more local level, as shown by this review to be strongly desired by businesses, may actually produce more benefit overall. Core executive team should focus on main activities that generate innovation and excellence of return on investment of time and money.

Finally, the need for the DMP to do more working across county boundaries such as is already successfully happening with the Peak District can only be a force for good. Good relationships with Birmingham and its LEP including parts of south and east Staffordshire and also with Shropshire, for example, should be able to produce more business for all.
Recommendation 1.1 Reshape the structure and activities of the organisation to agree co-working, de-duplication and empower tourism officers with clear roles and delivery responsibilities for specific work areas

1.2 Funding – At a time of reduced core and discretionary funds it is essential to have a strategic focus on generating more funding. The LEP is probably unlikely to be a source of significant funds and thus the DMP needs to look elsewhere: there are already products coming on stream through treasure trails, gift cards etc but these will probably generate a steady trickle rather than a torrent and must also factor in the time spent administering them. Website advertising is obviously an option but must be carefully done. Other funding, as well as increased membership income, must look not only at other grants such as the Lottery for specific products (such as a Staffordshire Heritage product, an ‘app’ or trail for example) but other ways to generate income such as commercial sponsorship or affinity deals. One possibility would be to generate more income via sponsored media working with other brands where appropriate. A focused group must take this work on in 2011 either as a ‘task and finish’ group, or subsection of the Board that meets when required.

Recommendation 1.2 Create funding task group from within the Board and other partners to focus on income generation opportunities and funding for the DMP

1.3 DMP organisation and style - Resolve or mitigate any tensions with partners by focusing on shared opportunities rather than differences. It is impossible to be ‘all things to all people’ but focusing on what brings most benefit to both members and the tourism industry as a whole will bring most success, including to the public sector funders, who after all, are investing tax payers’ money into bringing more benefit to those same tax payers. This should be seen as investment not as largesse. as The Board itself is large with 25 members, and whilst in many ways this is a great strength, there is an opportunity to have a smaller strategic group looking only at these ‘big picture’ issues rather than the whole Board looking at everything, both operational as well as strategic. Reviewing and slimming down the board - to a smaller strategic group of about 12-14 and encouraging others to become involved in the key actions and working groups should re-energise and refocus everyone. It will therefore be vital to ensure clear definition of roles and who each member is representing -for all sectors e.g. small and rural as well as bigger bodies.
1.4 Review and re-establish theme groups to be called delivery groups - given the new tourism/economic world and priorities. **We recommend** some larger standing working groups based on existing topics, but with other much smaller ‘task and finish’ (i.e. time-limited) groups – which wrap up once the “task” is completed or only meet periodically to review or address a situation. All groups should be very action-focused with a clear lead from one or two district or DMP Tourism Officers or a private sector partner. The task and finish groups in particular should be small, with perhaps only 4 or 5 people on each. There should not be a succession of the same officers coming to each and every group but a strong degree of trust and credibility should allow for communications to inform progress and development across the working groups. This should give new impetus to **deliver the actions in this plan**, which they will be tasked with, and new shape with less public sector overlap at delivery group level. Lastly we recommend that suppliers should attend groups only to report or present as and when necessary and asked, rather than as standing members, thereby allowing open discussion and the chance to look at other opportunities if desired. This also follows more standard governance practice.

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**Recommendation 1.3** Reshape and refocus board and play to strengths and interests of each board member and to member organisation strengths

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2. Marketing and Market Intelligence

2.1 Review and agree **Priority Market Segments** and the ‘right’ messages/media for each – thus including in priority order: staying visitors, day visitors, groups, overseas and travel trade markets. The tourism professionals should produce a **short** mini-strategy for each. Focus on what KPI monitoring and research is now revealing and target activity on what has worked best from the DMP’s activity: but sharpen up the methodology for analysing this return. If sufficient funding allows, this should be clarified through research and market testing.

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**Recommendation 2.1** Update and set out agreed ‘messages’ for main priority market segments and, budget permitting, market test before 2012-3 investment

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2.2 Review current marketing themes and propositions: **Open Up a World of Possibilities. For Culture, Adventure, Nature – Staffordshire has it All.** Refine and personalise these messages for target markets through better ‘connection’ to emotions and motivation e.g. key messages which
impact the recipient better, or through visual imagery allowing the potential customer to envisage the experience they will personally have. Review the words and images used – e.g. does ‘thrilling’ also impact on some other markets for products other than theme parks, is ‘heritage’ more resonant with some markets rather than ‘culture’, is ‘countryside’ worse or better to target certain key markets than ‘nature’?

The opportunity to personalise the product through online activity is enormous: e.g. ‘My Staffordshire’ options could work well for itinerary building and favourite activities and allow for greater measurement of impact of campaigns. Celebrity endorsements for certain products could also lend interest and weight. Festivals and events should be more visible and better promoted to give character and options to different markets. Even New Zealand’s award-winning 100% Pure campaign has recently been relaunched as 100% Pure You.

Agree the use of all Staffordshire’s ‘Star Brands’ to give personality and locus to the county rather than the other way round, by balancing the relationship between those star brands and the ‘offer’ of Staffordshire the county. Also consider specific themes and opportunities e.g. the Staffordshire Hoard, merchandising, SEQM and Made in Staffordshire.

Recommendation 2.2 ‘Personalise the product’ for market segments: review the words and imagery and match with proposition and markets. Immediate action followed by a review in three years time

2.3 Focus on the most effective marketing methods especially those of PR and social media: stress greater synergy with topical news items and create links to Staffordshire products, people and experiences. Strengthen and coordinate effective ongoing delivery in tandem with local authorities (eg SEAL and IWMS), private sector and other partners active in PR and social media. Encourage greater usage amongst membership, using professional expertise to upskill where required

Recommendation 2.3 Review and strengthen PR and social media content and synergy especially the option to invest more into PR activity overall not only in tourism media

2.4 Improve website especially itinerary building/themed searches and key word searching, plus generate personal recommendations/word of mouth effect e.g. through website UGC and social media. Ensure maximisation of Festivals and events information. Closely monitor website data and statistics, effectiveness and impact but as before, strengthen the robustness of ROI data conversion. Reflect all of the 2.3 outcomes.
Recommendation 2.4  Continue to improve and develop look and functionality of website: link to social media activity especially increasing ‘non official’ local authority endorsement but building more UGC recommendation visibility - and agree an integrated online plan or framework

2.5 Continue producing effective print but reduce duplication and target better. Communicate effectively to all members the purpose and target markets of each print item in order not to waste expensive print. Ensure all print is available as PDFs for web use. Ensure efficient links to festivals and events activities and bodies and in particular the new Festivals and events framework. Group to deliver the outcome ‘rationale’ for the choices made in time for 2012.

Recommendation 2.5  Focus on print matched to purpose, product and person – reduce or discontinue that which does not have a clear purpose and increase print run and distribution on that which does

2.6 Broaden Taste of Staffordshire activity and membership. Include more producers, retail and catering, clarify what it offers visitors and match with market segments. Food Festivals should be an obvious focus for marketing to important visitor segments. This may require a time-limited delivery group to give an initial boost – but not necessarily ongoing.

Recommendation 2.6  Reaffirm, clarify and strengthen Taste of Staffordshire and offer clear opportunities for both providers and visitors to benefit and add value

2.7 Agree a targeted strategy to boost Business and Conference Tourism amongst key partners who actively wish to engage in this market at whatever level. Ensure cross border working and maximise big players’ conferencing offers, at Alton Towers and Drayton Manor for instance, to new markets. Seek greater funding based on increased 2009 results where the addition of one member of staff in the main office for a limited time - with requisite call centre skills - was able to focus solely on seeking new business. Empower a group of those to whom it matters most to deliver targeted action, possibly ‘task and finish’ but may need periodical ongoing activity/monitoring.

Recommendation 2.7  Expand Business Tourism group and actively seek greater investment
2.8 Market Intelligence - Plan priority marketing intelligence needed and assign a clear purpose for its end use: research officers should create a small and simple research framework would anchor all research decisions and create a simpler way for all partners to understand what research is ongoing and for what purpose. Plan regular data collection on same basis, especially better occupancy, volume and value and a regular visitor survey every three years as essential. At a second tier a low cost ‘how’s business?’ annual survey. Importantly also look at scope to enrich intelligence with qualitative as well as quantitative data especially to investigate what is still not known e.g. non-visitors surveys and visitor perception and awareness of both the county and its product, niche studies periodically to target particular segments/issues. The likely top priority to start with is to research brand/awareness/proposition and agree priority segments either through focus groups or Arkenford research outside county. Continue the existing research group but smaller and more focused and link it more directly back to marketing and PR and more work on ROI.

Recommendation 2.8: Develop focused research framework to guide ongoing market intelligence activity and priorities

3. Membership and Communication

3.1 Develop more effective communications with members and partners through a new and simple communication plan. Review how best to support and communicate better with busy small businesses by asking them directly what communications style suits them best and assess effectiveness of communications/social media for members. Increase engagement through this simple but effective DMP Communications Plan ASAP and ensure consistent and careful delivery of regular communications. Doing less but better is likely to be better received. Regular does not have to mean more. Better engage with key partners such as NT, AONB and the National Forest through appropriate relationship building and activity. A Communications Task and finish group should create the plan and then meet less frequently and only when needed.

Recommendation 3.1  Develop short and simple communications plan and sharpen up delivery of DMP communications style

3.2 Expand membership - Streamline the membership offer - presenting it as simply as possible as many businesses still do not seem to grasp the benefits or 'what's in it for them'. The overall
offer should have a very simple sell. Membership solicitation should stress benefits in as clear
and overt a way as possible. Reinforce this with one or two obvious incentives and PR., clarify
and sell up benefits, create new benefits only if these actively help businesses with their bottom
line or respond to specific members concerns. Boost recruitment through peer
recommendation, ambassadors, target retail and catering as new business sectors and survey
non-members. Develop better survey samples through direct relationship with membership.
The role of District tourism officers acting as ‘ambassadors account executives’ and sales will be
instrumental to sustaining support in the long term.

**Recommendation 3.2 Develop simple Membership Expansion Plan**

3.3 Review and establish new options for DMP Business Support. With the demise of local
Business Links the options are more limited but the Chamber of Commerce and affiliated
Chambers along with Higher education and other business networks are active and possible
partners. This could include business development advice, marketing advice, training seminars
and support with IT systems such as Guestlink or other online bookings systems and social
media use. The national tourism business survey 2010\(^{25}\) identified the same issues needing help
and support wanted by businesses as that in this review. Businesses are mostly indifferent as to
who delivers it so long as it IS delivered. Possible scope for one identified Tourism Officer to
lead and work with other partners – or all Tourism Officers to deliver in their own areas. This will
require a sub- group to discuss and establish the best approach based on the original TALENTS
group but should be renamed to say exactly what it aims to achieve.

**Recommendation 3.3 Explore more local delivery solutions for Business Support through use of other
partner resource, expertise and skills**

6.4 More and better Networking events at local level, cross fertilising business, attracting and
encouraging more businesses to work together, providing on the ground business support as
above and good clear communications and dialogue at local level. There are opportunities to
increase engagement, recruit new members and retain existing ones for longer. Link to the
communications plan above, national accreditation issue and the localism agenda. Local Tourism

\(^{25}\) By QA and the Tourism Network
Officers to lead and deliver if appropriate and feasible. Devolve more to local networking level under the auspices of the DMP but with greater responsibility at local level, on the basis that outcomes are fed back to DMP for action if and when required. This frees up DMP executive to concentrate on most impactful and strategic activities highlighted in this strategy and also to capitalise on emerging ones.

**Recommendation 3.4 Boost local engagement with the DMP through local networking and communications and use of other business networks where suited (e.g. Chambers)**

4. Destination Management and Visitor Experience

4.1 Destination management is an important role for DMPs especially contributing to the co-ordination of visitor management and visitor services, influencing road signage and reinforcing a strong visual and quality welcome to Staffordshire. Visit England has recently reiterated that DMPs should be a leading partner on management as well as marketing activities. Destination Staffordshire should set up a new and focused working group which should agree its remit and priorities initially and then focus on specific destination management issues. It should address issues which will most improve the visitor experience in Staffordshire and which can be most immediately addressed, for example brown and white signposting or installation of orientation maps. The group should develop links to the relevant transport bodies to contribute to discussion of issues including public transport, car parking, the distribution of visitors around the county and developing alternatives to car travel. Planning issues are also likely to be a future area of need. This group will also be an important reference group for the LEP.

**Recommendation 4.1 Identify issues and infrastructure improvements needed and use DMP and local authority influence to gain actions where needed**

4.2 Product development especially for rural tourism, countryside and heritage – to extend the offer for visitors and improve the visitor experience. There is considerable scope to develop and promote more products such as trails, canals, cycling, walking developments and events. Examples might include a Staffordshire walking festival or new interpretation of canal sites or heritage themed trails. Mobile technology could be used to increase visitor experience and spending opportunities where feasible. Pursue potential funding opportunities for such projects eg Regional Growth Fund. Examine opportunities to link to projects such as Churnet Valley Living
Landscape and work with the Wildlife Trust, RSPB etc. Develop partnerships with more travel trade in this sector such as HF Holidays, Ramblers etc.

**Recommendation 4.2** Progress Product development especially in rural tourism – assess and look for synergies with providers, link to funding and specialist opportunities and explore commercial operator partnerships

**4.3 SEQM** - strengthening sustainable tourism approaches within and across the industry through the newly launched Staffordshire Environmental Quality Mark and communicating these to visitors as well as to businesses themselves. Extend the benefits of free SEQM activity for existing DMP members as a membership joining incentive (current STAGS group to link to new destination management working group and continue to monitor and boost progress with scheme as required.)

**Recommendation 4.3** Continue SEQM group but extend its reach and usage into further sectors and link to membership benefits

**4.4 Tourist information and visitor services** Review the role and remit of the current TIC sub-group to identify most effective input from the DMP working with TIC providers and researching any new opportunities or ways of working. In particular look at contribution to research and identify smarter ways of working together and generating more income. Also ensure good link to marketing group and activity to promote key messages and feedback visitor response.

**Recommendation 4.4** Review role of tourist information provision and research new opportunities

**Delivery**

The diagram on the next page summarises how the recommendations can be implemented through an amended Destination Staffordshire structure. The Board is best placed to lead on actions under priority 1. Three **working groups** are then proposed to lead and co-ordinate action on the three other **priority areas**.

As outlined in recommendation 1.4, some topics need to be addressed through more focused groups, some of which already exist and there will be benefits in linking them to one of the **three working groups**. Some of these **delivery groups** may need to be permanent with an ongoing role. Others can be established on a **task and finish** basis with a set of initial objectives which once achieved allow the group to be wound up and the working group would then
monitor and decide whether additional action or new task and finish groups are required – e.g. to respond to a particular opportunity or problem. Task and finish groups might operate for just six months if an issue simply needs a plan drawing up, but may need to run for longer depending on the topic. Partners will appreciate the sense of urgency a task and finish group engenders and the finite rather than open ended time commitment. Consultations indicated an appetite for this approach and to contribute their expertise in specific contexts.

This diagram is a starting point for further discussion. There may be other ways of presenting the structure – e.g. a reverse pyramid with the delivery groups at the top and board at the bottom or with the board at the centre of a ring of action and delivery around it. Discussion around this diagram is encouraged but the main aim is to focus DMP activity through effective delivery groups.
- Example of delivery group to be established/continued as ‘task and finish’ groups with limited time-frame.
- These time-limited groups to be Issue/ opportunity specific

- *Task & Finish delivery group as needed e.g. Hoard merchandising, Walking ‘product’, 2012 Torch relay
8. ACTION PLAN

"Promise, large promise, is the soul of an advertisement."
Dr Samuel Johnson 1759

NOTES ON ACTION PLAN

- The following action plan is thus based on all the foregoing and aims to focus on what the review has indicated as priorities and most likely to deliver the aims and objectives.

- The shaded green columns shows time scale of actions in the same way as a Gannt chart.
<table>
<thead>
<tr>
<th></th>
<th>Action</th>
<th>Yr 1</th>
<th>Yr 2/3</th>
<th>Delivery by</th>
<th>Indicative £Costs Yr 1</th>
<th>Performance indicators</th>
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<tbody>
<tr>
<td>1</td>
<td>Partnership Working</td>
<td></td>
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<td>DMP Board</td>
<td>5,000</td>
<td>Fewer marketing products delivering same or better collective ROI Reduced outsourcing budget More cross boundary links</td>
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<tr>
<td>1.1 Working smarter</td>
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<td></td>
<td>Review and reduce areas of duplication with partners and identify how to add value</td>
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<td></td>
<td>DMP Board</td>
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<td></td>
<td>Agree enhanced roles for Tourism Officers (including business engagement/support) and topics/tasks they can lead on</td>
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<td>DMP Board</td>
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<td></td>
<td>Review outsourcing policy and identify most effective delivery</td>
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<td></td>
<td>DMP Board</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Review DMP executive activities and time allocated so as to maximise impact</td>
<td></td>
<td></td>
<td>DMP Board</td>
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<tr>
<td></td>
<td>Identify and follow up opportunities for cross boundary working and build productive relationships with cross boundary partners</td>
<td></td>
<td></td>
<td>DMP Board</td>
<td>0</td>
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</tr>
<tr>
<td>1.2 Funding</td>
<td></td>
<td></td>
<td></td>
<td>DMP Board</td>
<td>Possible expenditure on external advice £3-5K</td>
<td>Funding generated</td>
</tr>
<tr>
<td></td>
<td>Maintain and build good relationship with LEPs</td>
<td></td>
<td></td>
<td>DMP Board</td>
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<tr>
<td></td>
<td>Explore income generation opportunities from new products, website advertising, commercial sponsorship, affinity deals or sponsored media working with other brands.</td>
<td></td>
<td></td>
<td>DMP Board</td>
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<tr>
<td></td>
<td>Increase membership income</td>
<td></td>
<td></td>
<td>DMP Board</td>
<td>0</td>
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<tr>
<td></td>
<td>Explore potential for grant applications and funding bids</td>
<td></td>
<td></td>
<td>DMP Board</td>
<td>0</td>
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<tr>
<td>1.3 DMP organisation</td>
<td></td>
<td></td>
<td></td>
<td>DMP Board</td>
<td>0</td>
<td>More action oriented meetings</td>
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<td>Action</td>
<td>Yr 1</td>
<td>Yr 2/3</td>
<td>Delivery by</td>
<td>Indicative £ Costs Yr 1</td>
<td>Performance indicators</td>
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<tr>
<td><strong>1.4 Working groups</strong></td>
<td></td>
<td></td>
<td>DMP Board</td>
<td>0</td>
<td>Increase in direct delivery</td>
<td></td>
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<tr>
<td>• Review and relaunch action based working groups and focused delivery groups some of which will be task and finish only</td>
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<tr>
<td>• Agree leadership and membership of each group to ensure action is implemented by group members</td>
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<tr>
<td>• Establish simple reporting mechanisms to share progress and establish trust so people attending group meetings need only be those directly involved in delivery</td>
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<tr>
<td>• Renegotiate relationships with key suppliers to reduce their time spent at groups meetings to increase time spent on delivery and allow more effective review of impact</td>
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<tr>
<td><strong>2 Marketing and Market Intelligence</strong></td>
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<td></td>
<td><strong>Marketing group</strong></td>
<td></td>
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<tr>
<td><strong>2.1 Priority markets</strong></td>
<td></td>
<td></td>
<td>Marketing group</td>
<td>£10k Research costs</td>
<td>Plans produced KPI monitoring</td>
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<tr>
<td>• Review and agree Priority Market Segments and the best messages/media for each within the following categories:</td>
<td></td>
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<td>- staying visitors</td>
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<td></td>
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<tr>
<td>- day visitors</td>
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<td>- group travel</td>
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<td>- overseas</td>
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<td></td>
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<tr>
<td>- travel trade market</td>
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<tr>
<td>• Review KPI monitoring and research and target activity on what has worked best</td>
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<tr>
<td>• Develop a short mini strategy for each market clarifying which media are targeting each.</td>
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<td>• Commission new research into perceptions</td>
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<td>Action</td>
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<td>Yr 2/3</td>
<td>Delivery by</td>
<td>Indicative £Costs Yr 1</td>
<td>Performance indicators</td>
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</table>
| and market segmentation to inform this process if funding allows  
• Market test and revise | | | | | |
| 2.2 Marketing themes | | | | | |
| • Conduct a short review of current marketing themes and propositions including specific wording, potential refinements and ways to personalise the messages for target markets  
• Explore more online applications for the propositions e.g. for itinerary building favourites or celebrity endorsements  
• Agree a protocol or guidelines for Staffordshire ‘Star Brands’ to give personality and locus to the county balanced with the wider ‘offer’ of Staffordshire the county.  
• Review the potential for new themes and time limited opportunities e.g. anniversaries, new developments, topical issues, including promotions and merchandise  
• Review themes again after three years | | Marketing group | £5k | Review implemented  
Improved online KPIs |
| 2.3 PR and social media | | | | | |
| • Continue effective ongoing delivery in tandem with local authorities, private sector and other partners active in PR and social media maximising total activity  
• Review investment in PR and identify options to improve effectiveness and increase investment  
• Develop greater impact and synergy with topical news items and more links to | | Marketing group | £50k | PR coverage, AEV and PR value.  
Social media e.g. followers |
<table>
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<tr>
<th>Action</th>
<th>Yr 1</th>
<th>Yr 2/3</th>
<th>Delivery by</th>
<th>Indicative £Costs Yr 1</th>
<th>Performance indicators</th>
</tr>
</thead>
</table>
| Staffordshire products, people and experiences.  
  • Encourage greater usage of PR and social media amongst membership | | | | | |

2.4 Website  
• Continue to improve and develop look and functionality of website(s) especially itinerary building and key word/theme searching especially festivals, events and topical/specialisms as developed  
• Link websites to social media activity especially increasing personal and UGC recommendations e.g. “My Staffordshire” choice options  
• Closely monitor website data and statistics, effectiveness and impact  

| | | Marketing group | £35k | Web KPIs, visits, views, downloads, brochure requests and bookings |

2.5 Print  
• Continue producing effective print matched to purpose, product and person but reduce duplication and target better.  
• Increase print run and distribution of items which have greatest impact  
  o Enjoy Staffordshire Visitor Guide  
  o Thrill Hopper  
  o Visitor Map  
  o Out and About newspaper  
  o Enjoy Card  
  o Welcome to the Countryside  
  o Staffordshire Peak District  
  o Gardens/Arts and Crafts, NB all of |

<p>| | | Marketing group | Topic specific Sub-groups | £140k | £5knet cost | £15k | £45k | £10k | £50k | £59k | Take up, Conversion to Bookings, advertising revenue |</p>
<table>
<thead>
<tr>
<th>Action</th>
<th>Yr 1</th>
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<th>Indicative Costs Yr 1</th>
<th>Performance indicators</th>
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</thead>
<tbody>
<tr>
<td>2.6 Taste of Staffordshire</td>
<td>• Ensure all print is available as PDFs for web use</td>
<td></td>
<td></td>
<td>£4.5k</td>
<td>this incs some web etc</td>
</tr>
<tr>
<td></td>
<td>• Reform Taste of Staffordshire Group to sharpen &amp; clarify the offer for visitors and opportunities for providers segments.</td>
<td></td>
<td>Taste group</td>
<td>£45k</td>
<td>Need to link to funding group to replace RDPE in future</td>
</tr>
<tr>
<td></td>
<td>• Broaden the Taste scheme activity and membership to include more producers, retail and catering</td>
<td></td>
<td></td>
<td></td>
<td>Membership, No. of entrants</td>
</tr>
<tr>
<td></td>
<td>• Explore opportunities for growing food/drink festivals and events, e.g. Stone Festival to spread and rebadge</td>
<td></td>
<td></td>
<td></td>
<td>PR coverage, advertising revenue</td>
</tr>
<tr>
<td>2.7 Business tourism</td>
<td>• Expand Business Tourism group and actively seek greater investment for increasing resources e.g. for sales.</td>
<td></td>
<td>BT group</td>
<td>£15k</td>
<td>Direct sales, web hits, enquiries,</td>
</tr>
<tr>
<td></td>
<td>• Agree a targeted strategy to boost Business and Conference Tourism amongst key partners in the market</td>
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<tr>
<td></td>
<td>• Ensure cross border working and maximise big players’ conferencing offers</td>
<td></td>
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<tr>
<td>2.8 Research</td>
<td>• Develop focused research framework to guide ongoing marketing intelligence activity and priorities.</td>
<td></td>
<td>Research group</td>
<td>£7k</td>
<td>More impactful &amp; targeted marketing</td>
</tr>
<tr>
<td></td>
<td>• Work closely with marketing working group to ensure marketing decisions are based on research findings</td>
<td></td>
<td></td>
<td></td>
<td>Based on Improved datasets and up to date data</td>
</tr>
<tr>
<td></td>
<td>• Collect better occupancy data by recruiting more participants (members &amp; non</td>
<td></td>
<td></td>
<td></td>
<td>Increased samples/participants</td>
</tr>
<tr>
<td>3</td>
<td>Communications and Membership</td>
<td>CM group</td>
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<td></td>
<td><strong>3.1 Communications</strong></td>
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<tr>
<td></td>
<td>• Establish a communications and membership working group, driven by members</td>
<td>CM group</td>
<td>£2k</td>
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<tr>
<td></td>
<td>• Develop simple, new communications plan</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>• Ensure consistent and careful delivery of ongoing communications with members and partners</td>
<td></td>
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<tr>
<td></td>
<td>• Better engage with key partners such as NT, AONB through appropriate relationship building and activity</td>
<td></td>
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<tr>
<td></td>
<td><strong>3.2 Expand</strong></td>
<td>CM group</td>
<td>£14k</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>• Develop membership expansion plan as part</td>
<td></td>
<td></td>
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<tr>
<td>Action</td>
<td>Yr 1</td>
<td>Yr 2/3</td>
<td>Delivery by</td>
<td>Indicative Costs Yr 1</td>
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</table>
| membership | of the communications plan - streamlining the membership offer and develop a simple sell  
- Promote the membership offer through incentives, PR, peer recommendation, ambassadors such as tourism officers and target new business sectors linked to funding group re income generation opportunities  
- Simple survey of non-members as part of new plan and offer | | | | | numbers  
Increased membership in wider sectors |
| 3.3 Business support | • Establish new business support task and finish group  
• Review and establish new options for business support delivery, including the role of tourism officers and other partners  
• Identify business priorities such as business development advice, marketing advice, training seminars and support with IT and online systems or social media use | | Business Support group? | £10k | Number of businesses supported |
| 3.4 Networking | • Linked to communications plan, organise a series of networking events to boost local engagement with the DMP across the county - Tourism Officers to lead if possible  
• Use the events to encourage joint working, discuss or provide business support, encourage dialogue and recruit new members. Discuss with Chamber, WiRE etc  
• Respond to issues raised and plan further appropriate events | | CM group | £5k | Events held, attendances and recruitment |
<table>
<thead>
<tr>
<th>Action</th>
<th>Yr 1</th>
<th>Yr 2/3</th>
<th>Delivery by</th>
<th>Indicative £Costs Yr 1</th>
<th>Performance indicators</th>
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</thead>
<tbody>
<tr>
<td><strong>4 Destination Management and Visitor Experience</strong></td>
<td>DEM group</td>
<td>DEM group</td>
<td>0</td>
<td>Impact on issues</td>
<td></td>
</tr>
<tr>
<td><strong>4.1 Destination Management</strong></td>
<td></td>
<td>DEM group</td>
<td>Identify initially from within RDPE funding; afterwards from core funding or new funding opportunities eg RGF</td>
<td></td>
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<tr>
<td>• Establish a new Destination Management and Visitor Experience Group to include key partners from relevant organisations who can feed in on relevant aspects of visitor management, infrastructure, transport, environment and visitor services.</td>
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<tr>
<td>• Agree role and remit of group and address top initial priorities which DMP has scope to influence action</td>
<td></td>
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<tr>
<td><strong>4.2 Product Development</strong></td>
<td></td>
<td>DEM group</td>
<td>Identify initially from within RDPE funding; afterwards from core funding or new funding opportunities eg RGF</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• New Group to identify top priorities and opportunities for product development each year and to encourage partners to find funding to implement – particularly rural tourism, countryside and heritage</td>
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<tr>
<td>• Maintain dialogue with key projects such as N Staffs Living Landscape, Peak District, Central Rivers group and relevant travel trade to ensure synergy and to capitalise on new investment</td>
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<td></td>
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<tr>
<td><strong>4.3 SEQM</strong></td>
<td></td>
<td>SEQM group</td>
<td>£36k from RDPE funding</td>
<td>No. of members taking up SEQM Visitor survey comment/impact; member research.</td>
<td></td>
</tr>
<tr>
<td>• Continue current Environmental Group (STAGS) as delivery group linking to the Destination Management working group to monitor and boost progress with scheme as long as required</td>
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<tr>
<td>• Support the roll out of the Staffordshire Environmental Quality Mark and ensure good take up, linked to membership benefits</td>
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<td>• Consider value of any other new sustainable</td>
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<td>Action</td>
<td>Yr 1</td>
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<tr>
<td>tourism initiatives for the DMP and advise/promote as appropriate</td>
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<tr>
<td><strong>4.4 Tourist information</strong></td>
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<tr>
<td>• Self Review the role and remit of the current TIC group to identify most effective input from the DMP working with TIC providers and researching any new opportunities or ways of working in the delivery of visitor services</td>
<td></td>
<td></td>
<td>Tourist Information group</td>
<td>£1.5k</td>
<td>TIC enquiries Numbers using new routes to TI Research outcomes</td>
</tr>
<tr>
<td>• Research new opportunities for “gateway” tourist information provision including new sites such as Alton Towers, new partners or media</td>
<td></td>
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<tr>
<td>• Ensure simple and effective link and feedback to marketing working group.</td>
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</table>
360 Tourism Consulting and The Research Solution would like to thank everyone who contributed their time and expertise to the production of this study. We are grateful to all who took part at any and each stage of its development and appreciate of all the time and consideration given to discussions and feedback.