Telford
Tourism Partnership

Telford and Wrekin

Destination Management Plan 2014/17

A good place to live is a good place to visit

Visit Ironbridge

Meet Telford & Shropshire

a co-operative council

Telford & Wrekin COUNCIL

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1 Introduction & background

1.1 Telford and Wrekin

Offering the best of urban and rural, this destination has it all; from its award winning World Heritage Site Museums and Convention Centre to charming market towns and villages. A destination located in the Heart of England; easy to reach, but still largely undiscovered.

The Telford and Wrekin area in Shropshire celebrates the best of old and new, much to the surprise of many of its visitors. It is partly bordered by Staffordshire to the east with the M54 going east to the Black Country and Birmingham and west to Shrewsbury and Wales. The River Severn flows south east from Shrewsbury, cutting a dramatic swathe through what was known as Coalbrookdale and today forms the southern boundary of Telford. This area east of Shropshire with its small towns and villages was known as the birthplace of the Industrial Revolution in the 18th century leading the world in innovation and engineering.

Today that heritage is celebrated in the Ironbridge Gorge World Heritage Site[1] (IGWHS), and its ten award-winning museums spread over four square miles. The Ironbridge Gorge Museum Trust (IGMT) tells the story of this area's unique role in world history and the Gorge is the prime driver for leisure tourism. With the historic Iron Bridge at the heart, the Gorge is set within the dramatic landscape of wooded valley sides and wildflower rich meadows where many other historic structures can be found, much of which is managed by the Severn Gorge Countryside Trust. 550,000 visitors are attracted to the Museums every year and up to an estimated 1 million into the gorge itself[2]. IGMT also offer unique conference facilities across the museum sites and with Birmingham University it provides the Ironbridge International Institute for Cultural Heritage.

Madeley forms the eastern gateway of the Ironbridge Gorge WHS. Recorded in Domesday it hid the future King Charles II after the Battle of Worcester in 1651 and is on the South Telford Heritage Trail.

Only 3 miles away from the Gorge is the historic town of Much Wenlock celebrated for its role in the rebirth of the modern Olympic Games through Dr William Penny Brookes, who started the Wenlock Olympian Games in 1850.

About 90% of Telford and Wrekin is covered by green open space and natural features and includes attractive villages and market towns some of which were amalgamated into the new town of Telford almost 50 years ago.

Wellington, sitting at the foot of the famous Wrekin Hill (which forms the northern end of the Shropshire Hills AONB), attracts visitors with its well known market, festivals such as the annual Wellington Literary Festival and Midsummer Fayre and also benefits from Sunnycroft – a National Trust Edwardian gentleman's suburban villa. It has its own train station and an exit from the M54.

Newport is a rural market town with a traditional market, tea rooms, pubs and a wide High Street of many independent shops. A blue plaque heritage trail helps visitors explore the town, including its Thomas Telford canal basin and its festivals and events include the renowned Newport Show and the biennial Newport Nocturne cycle race. New public path and cycle ways have just been completed and the Newport-Shrewsbury Canal Trust is gradually progressing with canal restoration. On the edge of town is Lilleshall National Sports

[1] Irecently listed by Trip Advisor as the second most recommended World Heritage Site
[2] Estimates undertaken in 2003/04 for the World Heritage Site Management Plan

Centre, used by many national teams, providing residential accommodation, conference facilities and the new £8m RBL Battleback Centre. On the edge of Newport is Harper Adams University, an international centre of excellence, attracting students from all over the world to its land-based courses, new Precision Engineering Centre and Regional Food Academy.

In Telford Town Centre, not far from Telford Central train station, the Telford International Centre sits at the heart of the destination's business tourism offer. Now one of the UK's top ten convention centres, it hosts over 200,000 delegates a year, creating spin-off economic activity across accommodation, hospitality, transport and other business sectors across Telford and Wrekin, Shropshire and into bordering counties.

In Telford Town Centre, adjacent to Telford Ice Rink, is the 170 hectare Town Park – built on many of the remains of the old industrial heritage of the area and now enjoying a renaissance after its £2m Parks for People "makeover". It now features nature and heritage trails, art, the QEII arena for events, the re-sited Norman chapel, traditional floral displays, innovative play areas, Wonderland Children's Theme Park, 'Closer to the Edge' high ropes aerial adventure and themed mini golf course.

In addition, from 2014 the destinations leisure and business tourism offer will benefit from the £250 million redevelopment at the heart of Telford Town Centre known as Southwater. This redevelopment will provide the town with an enhanced convention offer and new night time economy with bars, restaurants, hotels, IMAX cinema, new town centre library, spaces for arts performances and pop-up art and community facilities.

Also in the Town Centre, Telford Shopping Centre, contains most big brands and attracts a quarter of a million shoppers a week. Plans are in place for a further £200m redevelopment of the Shopping Centre that will compliment Southwater and includes creating new retail, catering and leisure uses and more active external frontages with new landmark buildings and improved gateways.

Other family attractions away from the Town Centre include Hoo Farm Animal Kingdom and Jungleland.

The town centre is also home to the Telford Campus of Wolverhampton University, which includes considerable accommodation and conference facilities and an Innovation Centre.

Radiating from the Town Centre and beyond are a range of new residential settlements and industrial parks – with over 5,000 companies, many in the key advanced manufacturing, polymers, automotive and IT sectors. Home to over 150 international companies including significant early foreign direct investment from Japan – a legacy from the original development ambitions that were put in place. This continues to produce fact-finding visits to the area from the Far East, particularly to the Ironbridge Gorge World Heritage Site and its innovative museums.

The destination has always benefited from its proximity to and good working relationships with Weston Park, RAF Cosford Museum and the Severn Valley Railway, all of whom have expanded their offer in recent years and who work closely together with IGMT in the marketing group known as Shropshire's Star Attractions.

Whilst most large hotel accommodation is centred around Telford Town Centre there is substantial accommodation provision through good B&Bs, and some independent hotels in the Gorge and in the market towns, details of which are in Section 3.

With its World Heritage Site and growing convention business, the destination is now poised to develop its visitor economy through a managed series of shared priority actions for future success.

1.2 Telford Tourism Partnership

The Telford Tourism Partnership (TTP) is the destination's strategic body for the tourism sector.

Supported by the Tourism Team at Telford & Wrekin Council, the role of the Partnership is to provide a voice for the local tourism industry and act as a membership organisation for both business and leisure tourism under the Visit Ironbridge and Meet Telford & Shropshire brands.

In addition, Shropshire's Star Attractions group has added extra weight to the promotion of the destination and the surrounding area. Some members of this group also belong to the Heart of England Attractions, a consortium of 15 attractions across the West Midlands who collectively attract over seven million visitors and who communicate directly with Visit England and the Department for Culture Media and Sport.

The Telford and Wrekin area continues to benefit from large-scale investment that puts the visitor economy at the heart of the destination and encourages growth. This plan has been written in partnership with members of the Telford Tourism Partnership and key businesses and organisations with the objective of continuing improvement and growth in the visitor economy and securing a joint commitment to excellence in destination management.

The Destination Management Plan sets out and analyses the destination's current performance in order to create a partnership strategy and plan for the tourism economy and for all partners that will:

- Identify gaps in provision, any market failure, weaknesses, areas for improvement and market opportunities
- Set out the main objectives for future growth
- Set out the priority actions together with an action plan
- Identify roles and responsibilities for all tourism stakeholders

The TTP Board members represent all operating sectors of the local visitor economy and will be responsible for overseeing the delivery of this Destination Management Plan.

2 National, strategic & local context

There have been significant changes in tourism organisation at national and regional level since the Coalition Government came into power in 2010. Visit Britain and Visit England are the only formal organisations at national level and there are no longer any identifiable tourism 'regions'.

Where Does Telford Fit In?

2.1 Visit Britain

VisitBritain (VB) is the national tourism agency, responsible for marketing Britain worldwide and supporting Britain's visitor economy. It's a non-departmental public body, funded by the Department for Culture, Media & Sport, VisitBritain's partners include government agencies such as UKTI, airlines and operators, global brands such as Samsung as well as the official tourism bodies for London, England, Scotland and Wales.

Its current base budget is c £25m plus a joint marketing campaign derived from the Olympic legacy. It has recently updated its original Deloitte's report on the Value of the Visitor Economy in Britain showing predicted growth of employment in the sector to double by 2025. It calculates that tourism delivers £127 billion GVA, which is 9% of UK GDP[3]:

In 2012 Telford and Shropshire benefited from the numerous press visits to the area, largely springing from VB's global PR lead, inspired by the historic Wenlock Olympian Games legacy, which produced excellent coverage for nearby tourism products, like Ironbridge. Abraham Darby I, father of the Industrial Revolution, was mentioned in the Programme for the Opening Ceremony of the London Games and Golden Bear Products of Telford designed the Olympic mascots Wenlock and Mandeville.

[3]Deloitte's EIA of UK Tourism 2013 & KPMG/HLF/VB UK Heritage Tourism EIA 2009 updated 2013

2.2 The value of tourism in the UK

The following tables indicate the overall impact of the visitor economy across the UK as a whole and its component parts.

Fig 1 The tourism economy: contributing to UK growth*

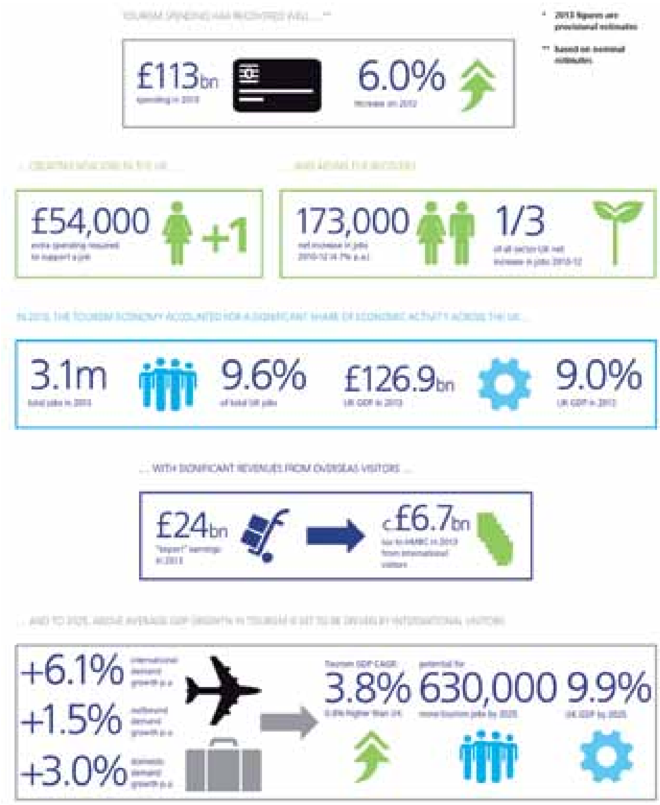
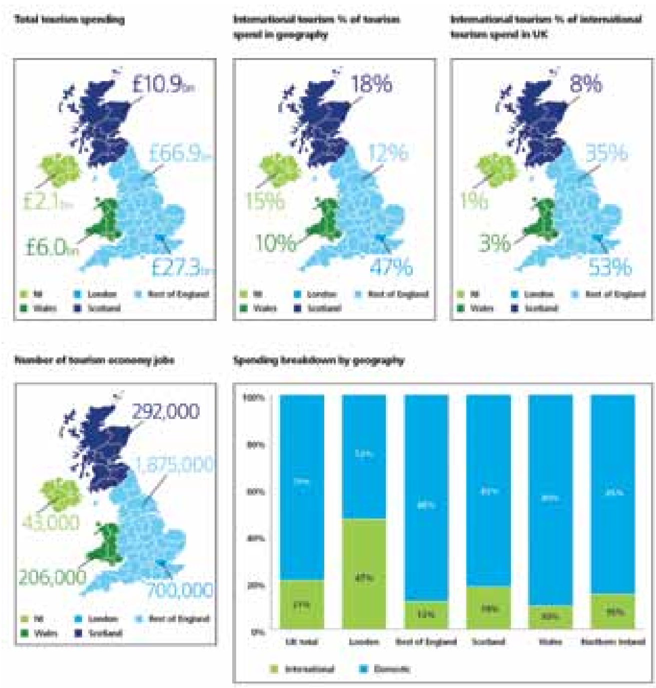


Fig 2 Tourism: benefiting all of Britain



2.3 VisitEngland

VisitEngland (VE) is the country's national tourist board. Its role is to grow the value of tourism by working in partnership with the industry to deliver inspirational marketing campaigns and to provide advocacy. The organisation's work is underpinned by robust research and customer insights.

VE Vision and Objectives: To maximise tourism's contribution to the economy, employment and quality of life in England.

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

The Strategic Framework for Tourism in England 2010 - 2020 sets out the ways in which the industry can work together to achieve a 5% growth in value, year-on-year, over the next decade which will lead to an additional £50bn in expenditure and the creation of 225,000 jobs.

It has a strategic marketing strategy and a key brand attractor 'map' designed to build on "winners" and framed on the premise of *"if you like this, then you will like that"*. The Ironbridge Gorge World Heritage Site is the only 'attract brand' west of Birmingham in VisitEngland's brand map, by virtue of its World Heritage Site status.

VE was successful in winning a £20 million RGF bid to promote tourism in areas where there was strong potential for job creation. Its latest performance

Top, left to right: The Iron Bridge, Ironbridge Gorge; World Heritage Festival; The Engine Room at Enginuity

results[4] show strong growth in domestic visitors of circa 9%, outperforming its own aims.

It has recently established a formal partnership with Arts Council of England to encourage greater collaboration between culture and tourism. It has also established a tripartite channel for engaging with all Local Enterprise Partnerships via the Department for Culture Media and Sport.

VE works with partners and key businesses in order to deliver its strategic actions and one of its key partnerships is the Destination Management Forum (DMF) of which TTP is a member. To become a member of this Forum which meets bi-annually, VE requires evidence of tourism management responsibility, private/public partnership and a Destination Management Plan.

[4] Ibid

2.4 The Value of leisure tourism in England

- In 2013 England accounted for over 83% of UK visitor spend (£94 bn) showing real growth of 3% over 2012, of which c25% is spent in London
- In 2012, £19.5 billion spent by British residents on 104.5 million overnight trips in England, equating to 310 million nights away from home.
- £48.5 billion spent on 1.5 billion domestic tourism day trips
- £16.3 billion spent by inbound visitors, who made 26.8 million trips and stayed for 203 million nights.
- With multiplier effects tourism employment is around 9% of UK employment
- 25.2 million overseas visitors to England spent £14.4bn
- Around 873 million day trips were made in England, with a spend of £39bn

Heritage tourism

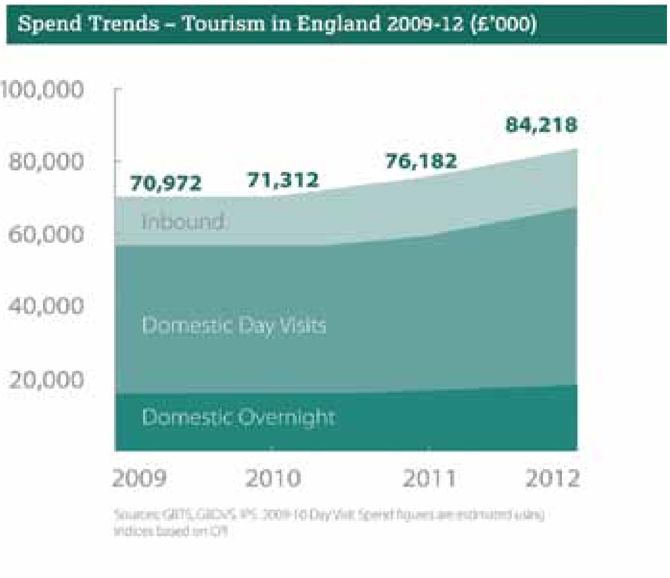
40% of overseas leisure visitors cite heritage as the primary motivation for their trip to the UK – more than any other single factor[5]

£12.4bn is spent not just at heritage attractions (e.g. entrance fees, museum shop) but also broader spending 'motivated' by those visits (e.g. eating out or accommodation)[6]:

- £7.3bn based on visits to built heritage attractions and museums
- £5.1bn based on visits to natural heritage, including parks and the countryside

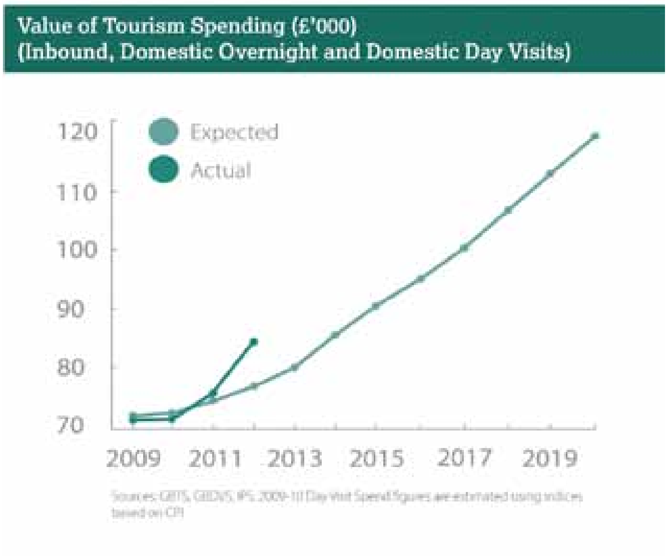
[5 and 6] Ibid

Fig 3



Employment in the visitor economy sector can be seen to be growing, although the traditional view of tourism jobs tends to view them as low paid, low skilled, unlike many competitor countries.

Fig 4



2.5 VisitEngland Business Visits & Events

Business Visits & Events is the business arm of VisitEngland, responsible for promoting England's Business Visits and Events product.

A new strategy for business visits and events is being developed which will focus on the best opportunities for growth. In the meantime, VisitEngland continues to target its priority international sectors, namely the corporate, incentive, exhibition and association sectors in England's leading source markets of USA, Germany, France and the Benelux countries.

Campaigns in each market comprise of various activities including 'England' branded events, sales missions, exhibitions and educational visits, VisitEngland's quarterly buyer newsletter, regular destination features in leading international publications, PR activity and comprehensive website.

2.6 The business tourism market in the UK and England

The UK Event Market Trends Survey (UKEMTS) was published in 2013 alongside the first Economic Impact Study of Business Tourism using the UN World Tourism Organisation methodology. Together, the two reports provide comprehensive and compelling evidence that business tourism is a growth driver at national level with significant impact on the wider tourism industry and inward investment.

National market, context and performance

The UKEMTS Report confirms cautious optimism and an upward market trend. While return to 2008 peaks is some way off there has been positive growth in the volume of events business, the scale of events booked and a rise in the engagement of Professional Conference Organisers (PCOs) and Agents. A key catalyst for the future growth of the events sector was the London Olympics 2012, which provided an opportunity to market the UK's unique locations and rich visitor experience while showcasing to a global audience the ability of the UK to host and stage mass audience events with creative and technical flair.

2012 saw a growth in the volume, value and range of meeting and events business planned by the key industry buyers. There is clear evidence that the sector has changed considerably during the economic downturn. Buyer expectations and behaviour have been driving significant changes in the type and duration of events booked, with the Corporate market recovering, the Government market declining and the Association market remaining strong.

The report provides a measure of the Key characteristics of the UK Business, Events and Conference market and estimates the Volume and Value of the UK MICE[7] sector:

- 1.3 million Meetings held in UK in 2011 and 2012
- £40 billion business visitor spend
- London, South East & West Midlands top performing destinations
- MICE generates 2.9% of UK GDP
- MICE industry employs 423,500 FTE jobs
- MICE industry supports over 1 million FTE jobs
- 85.5 million Business visitors
- 140million Business event days

Average Event Duration

Average event duration was 1.6 days
28% of Events were Residential (20% in 2011)
63% of Events Non Residential

[7] MICE; Meetings, Incentives, Conventions & Events

National Market Profiles and Performance

56% Corporate
23% Government ad Public Sector (37% 2009)
21% of events Association
1/3 of above events are Booked by PCO's

The National Multiplier Effect on Economic Impact

Business visitors spend an average of £178 per day, 50% more than the average leisure visitor[8]. In addition to direct benefits attributable to business activity in MICE sectors it complements and supports the wider visitor economy including mid-week leisure accommodation providers and the wider tourism supply chain including transport, entertainment, restaurants, print and more, as well as potential cross-sell of business tourists to leisure and attracting extended leisure stays from business delegates. Visit Britain has assessed this effect per delegate per day[9]:

Event type	Expenditure per day
International associations	£364
National associations	£170
Corporate	£120
IPS Overseas business visitors	£131
UKTS business visitors	£105

Intermediaries and Professional Conference Organisers (PCO) are employed by 35% of events and the report shows an 8% growth in their usage since 2008.

Origin of Events

The main geographical sources of Venue business in the UK are from local and regional markets at 64%. The ratio of local to national business remains much the same. 32% of Events generated from the UK market and despite the profile of London 2012 mentioned above still only an unchanged 4% of events from overseas markets.

[8] Comparison with overnight leisure visitors source BVEP
[9] Average across UK

Volume and Value

The UK Economic Impact of the UK Meeting & Events Industry (UKEIS) for the period 2011 – 2012 calculates for the first time the real value of the sector to the UK economy. Geographical performance in England shows that the West Midlands performs only a little lower than the South East (excluding London) although the city table excludes Birmingham!

Proportion of Events by Market

The UKEIS figures show even more growth in the PCO and Agent sector with 59.4% of events booked against 28% from Corporate Sector.

Seasonality

Nationally the key period remains January, March, April and May with September, October following.

Meeting Types

Consumer events and exhibitions are still those generating the most volume of business visitors but it is the value of visitor spend that most host organisations are seeking. The Association market delivers this return and the following statistics below show a breakdown of figures for both volume and value:

HIGHEST VOLUME OF Business Visitors
Number of Visitors/Delegates
Expos and Consumer Shows
50.2% of the 85.5million business visitors

HIGHEST VALUE OF Business Events
Spend per Visitor / Delegate
Conventions and Conferences
£10.6 million of £40billion total business spend

See Appendix 1 for supporting graphs and tables for the Business Tourism Market in the UK and England.

It is vital that Telford and Shropshire respond to changing buyer expectations and changing market drivers in order to gain a competitive and sustainable market share of the UK MICE industry. The UKEMTS Tactical Conclusions for UK Business Tourism study drew some useful conclusions about trends in buying behaviour and types of events which are shown in Fig 28 and which can help inform any future activity at a local level in Telford & Wrekin.

Fig 28

Survey indications	Implications for sector action
9% of UK Event Venues believe booking lead times are getting shorter.	Implications for action - Increased pressure but opportunity to convert business quicker
56% of venues are reducing rates to win business and retain competitiveness	Implications for action - alternative is to offer value--added service or product that delivers increased ROI for the buyer against the competition e.g complimentary WiFI etc
51% of Venues believe the Corporate Market growing	Implications for action - Corporate market is recovering but buyer expectations are changed. Consider value-added/ packages with focus on quality, service and ROI due to cost vulnerability.
56% of Venues reported a downturn in Government business	Implications for action - Remain engaged and ready to capitalise on any upturn
40% of Venues are seeing a new event trend – the “hybrid event”: combination of Face to face and virtual events.	Implications for action – Drive to maximise ROI and increase reach of an event eg through live streaming at face to face events and develop extended life and value of an event. Venues must gear up to offer this with inbuilt technology.
78% of Venues have undertaken investment in 2012 with 10% of this above the £500k mark and 36% of this was on ICT.	Implications for action – Buyers want venues remaining fresh, relevant and engaging and that means investment. Retaining standards is as important as commitment to buyer needs.
The Destination Appeal Factor - The top 5 Convention Centres in the UK report increase in the Destination Factor in winning Major Events Business	Implications for action: In order to win major event bids destination and partners must sell the destination/the delegate visitor experience. It will tip the balance in a win or lose position
Creating Best value for multi year contract commitment	Implications for action – Large Scale Conventions and Expos are seeking longer term commitment based on Best value Multi Year deals. More clients expect this and venues showing total real cost savings/ added value can expect to yield long term returns.
Unusual Venues are in prime position to deliver on this emerging buyer demand	Implications for action (local) – Telford has good range of ‘Unusual Venues’ and should do more to capture this market
Some optimism is returning with **53%** of UK Event Venues anticipating growth.	Implications for action – Retain level of service and resources to respond to a growing market

2.7 The Marches Local Enterprise Partnership

Telford Tourism Partnership is linked to the Marches Local Enterprise Partnership (LEP) through Telford & Wrekin Council and therefore benefits from closer collaboration with the wider Shropshire area and Herefordshire. A LEP Tourism Group is currently in place to ensure opportunities for sharing destination management and marketing are taken, with a particular focus on the £100m European Structural Funds Programme 2014-20 allocation. Potential investment could be made in infrastructure as well as relevant sector skills training and business support for visitor economy businesses.

The 'Marches' area comprises around 630,000 people and 28,000 businesses and currently contributes £10 billion to the UK economy. The GDP per person in Herefordshire and Shropshire is among the lowest in the country but that of Telford and Wrekin is higher at £18,869 pp and with a GVA increase per head of 3.7% during 2011-12. The borough generated £3.16bn for the national economy in 2011.

The vision for the Marches, set out in its Strategic Economic Plan (SEP) 2014 is:

A strong, diverse and enterprising Marches business base, operating in an exceptional and connected environment, where the transfer of technology and skills foster innovation, investment and economic growth.

The SEP sets out an investment strategy to achieve accelerated economic growth through 2014 and beyond, delivering high levels of housing development, new enterprise areas and strategic employment sites for new and expanding businesses.

The SEP identifies the Visitor Economy as a key sector for the Marches, generating more than £1billion, employing over 33,000 people and accounting for more than 15% of the total LEP GDP. The area's numerous unique and outstanding tourism assets are recognised in the SEP which also acknowledges that 'The Marches' is not a recognised consumer brand as a visitor destination.

The LEP recognises that to increase market share, destinations and businesses need to act collaboratively to provide the best context for business development, to improve product position and to continue to innovate to develop new products and services to meet challenging customer needs.

A LEP-wide Tourism Group has been formed and has prepared an outline strategic case for investment in tourism infrastructure, destination management and marketing for inclusion in the LEP's European Investment Strategy 2014-20. This will direct the expenditure of the LEP's funding allocation in order to support economic growth and job creation.

This LEP Tourism Group is intended to evolve as a strategic player, with an important role to play in the approval and direction of investment over the period of the EU Funding Programme. At the same time the need is acknowledged for the continuation of delivery partnerships at the local level such as the Telford Tourism Partnership. The 2013 Visit England results by former regional structures shows the West Midlands lagging, only just above the North East and the LEP should aim to contribute to improved performance in this area.

Fig 5

Destination - Region	Trips (millions)	Trips (%)	Spend (£ millions)	Spend (%)
Total England	104.46	100%	£18,487	100%
West Midlands	8.30	8%	£1,234	6%
East of England	9.68	9%	£1,674	9%
East Midlands	8.50	8%	£1,339	7%
London	12.15	12%	£2,768	14%
North West	14.19	14%	£2,664	14%
North East	4.23	4%	£777	4%
South East	17.92	17%	£2,929	15%
South West	19.74	19%	£4,181	21%
Yorkshire & the Humber	11.25	11%	£1,667	9%

The SEP and Marches LEP European Investment Strategy identifies the following strategic priorities to support growth in the Marches visitor economy:

- Infrastructure, including broadband access and effective transport networks
- Research/sector intelligence to support SME business investments and decisions
- Business support giving access to timely and good quality advice, training, networking and routes to market
- Access to finance
- Workforce development (sector skills)
- Strategic product development capable of creating significant growth in visitor numbers and value
- Investment in cultural/heritage assets (both urban and rural) including festivals and events
- Research and development, innovation and ICT – to exploit relevant and effective IT to influence visitor markets and behaviour
- Marketing and PR to create a strong destination profile and framework

2.8 Other organisations

Shropshire Tourism is a membership-led tourism marketing company that publishes an annual Shropshire tourism brochure, runs various destination websites and campaigns.

There is also the online *"virtual" Visit theHeart of England* company which many local attractions work with for promotional purposes.

2.9 Social, economic and technology trends and changes

It is vital to consider the factors influencing visitor markets and consumer behaviour. Major changes affecting the visitor economy have taken place over the past decade and can be expected to continue, requiring Telford (and its businesses) to respond accordingly if it is to thrive as a destination. These include:

Lifestyle and economy

Recent Visit England research[10] indicated changing family patterns which will influence visitor behaviour in the future, summarised in Fig 6.

[10] VE Domestic Leisure Tourism Trends for the next decade. December 2013

Fig 6

Ageing society	As life expectancy increases, there will be increasing numbers of older people in society
Vertical family	Driven by both rising life expectancy and lower fertility rates, the shape of the family is changing
Baby boom	Over the past fifteen years a sustained rise in the birth rate has caused a mini baby boom
Untraditional families	New types of family are emerging – including step families, gay parents and older parents
Changing ethnic profile	A rising number of both BME and foreign born people, whose tourism habits need to be understood
Squeezed middle generation	Amid rises in the number of younger and older people, the number aged between 35-49 is falling
Multispeed demography	For different regions and local authorities, the speed and nature of these trends varies widely

Other issues are already taking effect:

- Crisis in the economy – increased unemployment, especially for young people, more part time working and continuing low pay, interest rates and annuities for older markets/retirees
- Continuing turbulence in the international economy for the foreseeable future
- Major cuts in funding to the public sector after a decade of public largesse with many areas resulting in nil growth or closure in public sector marketing/tourism budgets
- Fuel prices have increased and some markets have begun to reduce travel distance and frequency of trip taking – a destination now has to be worth the effort and cost of travel
- Family patterns are changing, different family groups and growth in the 'pink pound'
- An ageing population continues to see a greater number of older people and fewer younger people. Older 'empty nesters', children have left home, are having to work for more years before retirement and for potentially lower pensions than a decade ago
- Conversely the 'grey pound' is strong and the '60 is the new 40' mantra appears to be bearing up in surveys measuring adventure holidays/hiking, 'old age' gap years etc. But there is a greater choice than ever for these segments which means it is harder to target in a diverse range of channels
- Major changes to the planning system may bring greater opportunity for communities to differentiate themselves and their local area with an equal risk of unsuitable development, mass market solutions and loss of identity and independent providers

Leisure trends

- Ever increasing competition for people's discretionary leisure time and spend means tourism is competing against 24/7 multi--channel screen and music, gardening and DIY and leisure retailing
- For some visitor markets, there is a conscious desire to get away from communication and to switch off and relax
- The main holiday week/fortnight continues to decline, although recession years have seen a reasonably robust boom in UK holidays ('staycationing'), often in less expensive camping and self catering
- However, overseas long holiday taking and use

of no-frill flights continues to grow although many of the low cost airlines are now belying their name

- Many UK destinations remain short break secondary holiday locations and despite the down turn, spa breaks and luxury breaks remain strong
- Climate change, bad weather and flooding may become a major issue for some destinations, especially some rural areas
- Increased expectation of quality and 'better than at home' holiday accommodation has led to growth of boutique hotels
- More environmental awareness, reducing carbon footprint and growth in markets seeking locally produced food and drink, products and crafts and authenticity in their experiences. '
- All-weather' businesses and destinations also continue to perform better, especially in the traditionally quieter months of the year

Communication [11]

- Internet access has hugely increased with faster coverage and greater access to mobile 3 and 4G smartphones, tablets, internet on the move, hand held satnav GPS etc
- Areas where there is poor mobile signal, little or even no fast broadband connection are at major disadvantage; an issue across parts of Telford, especially the Ironbridge Gorge and rural areas.
- Traditional tourist information provision is not enough and must now provide twin-tracked solutions to keep up with "instant" expectations, though print remains strong 'in destination' with certain markets and where broadband and/or signal is poor.
- More and instant trip research and bookings, peer reviews and social media are driving later as well as advance booking and mobile payment is now in a major growth phase.
- Multi-channel marketing opportunities can be brilliant for big brands and businesses but time consuming and out of reach for many SMEs
- 74 hours of video worldwide is being uploaded to YouTube every minute
- There are 17.3 million smartphone users in UK with over half the UK population owning one (53% in 2012)
- c88% of UK households with internet access and 70% of UK adults going online daily
- Facebook now has over 31m UK registered users penetrating 52% of the population and Google+ claims to have overtaken it
- Around 140 million Tweets are sent each day compared to a total of 25 billion tweets in 2010
- Huge online, multi-channel presence of available experiences leading to "FOMA" ('Fear of missing out') in some younger markets
- Google Glass and Augmented Reality are now providing real time or new ways of looking at products afresh

So it is clear that the 'conversation' between providers and customers is wide open, whether the demand or provision is for luxury, high end goods and services or value for money products. The boutique hotel brand at one end and a small pub at the other can both reach their target markets directly. How best to engage with these markets in ways that are cost effective in the new world of 'always on' dialogue online is the focus, with it being easier than ever to 'talk to' the customer direct.

The most successful businesses are those that continue to invest in their product and maintain its quality, know their markets and are able to give the customer what they want with sophisticated yet practical yield management techniques that do not compromise profitability.

[11] Figures supplied correct at time of writing but will by their very nature be different within months. Source: Google, VE, and sector intelligence

3 Telford's visitor economy: Perceptions, profile & performance

3.1 Background context for market performance

One of the challenges for this Destination Management Plan was to ascertain the true position of the Telford and Wrekin Visitor Economy. Telford is different from the rest of the Marches area in that is has a very strong business tourism sector, which it formerly shared in common regionally with the West Midlands Business Tourism "arc" stretching via the Black Country, Birmingham and down to Coventry. Since the demise of the Regional Development Agency (RDA), there has been little resource to continue with both the joint marketing activity in this sector and its related research and performance monitoring.

Leisure tourism has had more research but has still suffered from different briefs based on different objectives. Thus, there is a huge range of data available, but there is considerable variation and fragmentation in its quality, robustness, relevance, and timeliness. Further difficulties include changes in modelling and framing of the research from being "all Shropshire" to two unitary councils and then to cross-LEP. Big gaps between research has also resulted in it being almost impossible to compare like with like and to track progression or otherwise. There is also the problem of whether Shropshire means the geographic county including Telford, or whether it means the Shropshire Council area and indeed, whether respondents to surveys care one way or the other. Similar issues exist around business support and investment, where the councils may only support businesses paying business rates in their own area, even though working together as a whole might produce better dividends.

Whilst this may be a rather negative picture, the upside is that it points directly to a clear need for robust, regular and consistent research in the future and will be a clear priority for the Action Plan. A list of all research data is contained in the Appendix to this plan but what follows in this section aims to present a picture of:

- Leisure Tourism Market segmentation and target markets
- Volume and Value of leisure and business tourism to the area
- Volume and Value of Visitor markets to the main attraction
- Business tourism target markets and performance

What then follows will be:

- A reasonable understanding of current performance; what is successful, where there is market failure and, importantly, where the greatest ROI is to be had in the future
- A focused set of priorities for TTP and how these will be delivered through the Action Plan in Section 5

3.2 Telford & Wrekin Council Tourism Team: Activity and outputs

The tourism team as a whole consists of three operational officers, of whom only one is full time, and there is some ad hoc support from one or two other Telford & Wrekin Council officers in the same department overall and a new Business Support officer with a strong tourism advisory background.

The unit has been restructured several times in the past few years, with different managers, but is now line-managed by the Council's Investment & Funding Team Leader within the Development, Business and Employment unit.

The Tourism team at the Discovery Event 2009

The tourism team delivers national sales and marketing campaigns from which Telford Tourism Partnership members benefit as well as contribute. This is funded by the Council as well as annual TTP membership fees and specific marketing opportunities which TTP members can buy into. The team run events for the Partnership and a weekly e-newsletter goes out to keep the local industry updated and informed with the latest news.

3.3 Leisure Tourism – Visit Ironbridge

The destination's leisure tourism activity is delivered through the Visit Ironbridge marketing campaign. It includes the production of 20,000 A5 destination brochures (which includes advertising), a further advert-free 100,000 days out leaflets which are distributed in a similar area to the IGMT marketing catchment[12]. There is a website which is supported by associated social media such as the Twitter account. An email campaign goes out to 120,000 addresses and a PR consultant (who also works for IGMT) promotes the destination as a whole. In 2013 editorial coverage produced just over £176,000 in PR value when assessed as advertising equivalent cost, representing a return on investment ratio of around 1:35.

Performance Activity Conclusions

Performance data for the online and offline outputs together with some conclusions reached based on the impact of activity, would suggest the following:

- The small investment in PR is outperforming all the other activities and should be increased and as awareness of the area is also a problem factor in business tourism (see below) this would have double benefit.
- Almost half the visits to the TTP website are from mobiles and thus proper mobile-appropriate content/mobile website needs creating as soon as possible. The most popular pages are "Visitor Information", 'museums' and

[12] see Section 3.9

'B & B' and thus the website needs to have greater "calls to action" and tweet/Facebook buttons for instant postings by users and thus higher search rankings. More incentives/content for returning/lapsed audiences to engage with is required as there are currently only 15% of traffic, the rest being new visitors to the site.

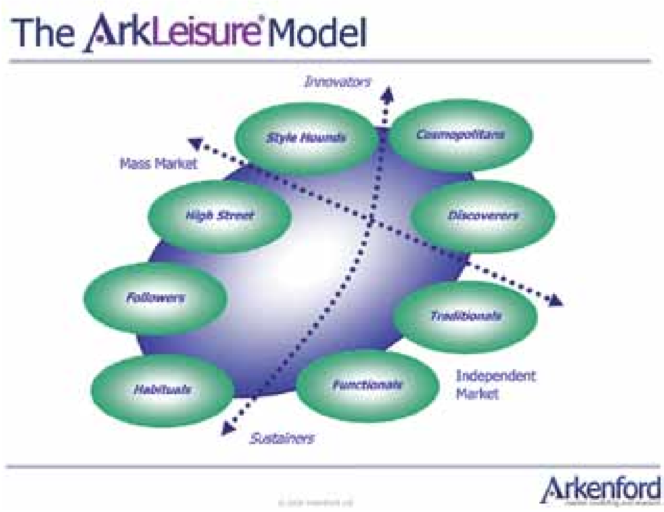
- Over 60% of searches are from Google, and the greatest referral is from the IGMT site ironbridge.org.uk site with hardly any from key partners. This needs to be quickly rectified by reciprocal links. Searches via visitors looking at Ironbridge or Telford on Shropshire Tourism's website are unknown as their website has no reciprocity with the TTP site, (other than a website link to IGMT's website) and so it is recommended that their analytics are requested to gain this information or that accord is reached to share data through reciprocal links. This is particularly relevant to Accommodation searches and to Business Tourism where Shropshire Tourism has created its own conferences micro-site rather than link to Meet Telford & Shropshire.
- The top search key words almost all relate to Ironbridge in one form or other, with the ice rink, laser quest and a few others finding a place lower down.
- The social media accounts and activity need proper investment and should not be left to staff to fit in amongst their other commitments but supported and directed by a tight online plan, as part of a new limited, focused Marketing Plan targeting the key segments already identified in both the generic research and the IGMT Vector research – see Action Plan
- The print products need to be better incentivised in order to measure conversions as well as cost per response, where possible and carry QR codes or similar in order to take readers straight to the website(s) and social media.

3.4 Leisure visitor perception and awareness of Telford and Shropshire overall

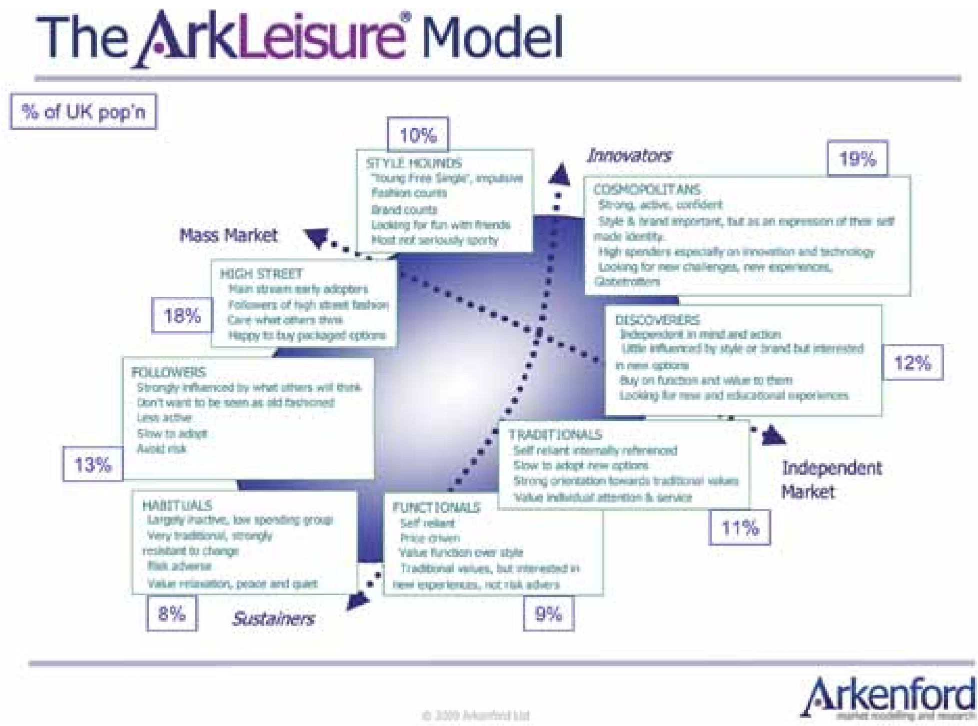
In 2009 Arkenford undertook research for the former RDA on perceptions, awareness and the markets for West Midlands' tourism sub-regions. Each DMO received its own report and Shropshire was researched as a whole i.e. Shropshire as a geographic entity including Telford and Wrekin. This section presents a recent snapshot of perception and actual visitation, broken down against the Arkenford Arkleisure market segments, as used by Visit England and many English tourism destinations[13].

The Arkleisure model uses specific classifications based on the Values, Aspiration and Lifestyle (VAL) model (Fig 7) of individuals as opposed to the more standard socio-demographic Acorn/Mosaic breakdown. It doesn't replace it but, working in parallel, it is a more useful type of classification for the tourism economy, allowing destinations to match their offer to those markets that identify them as "my type of place to visit".

Fig 7

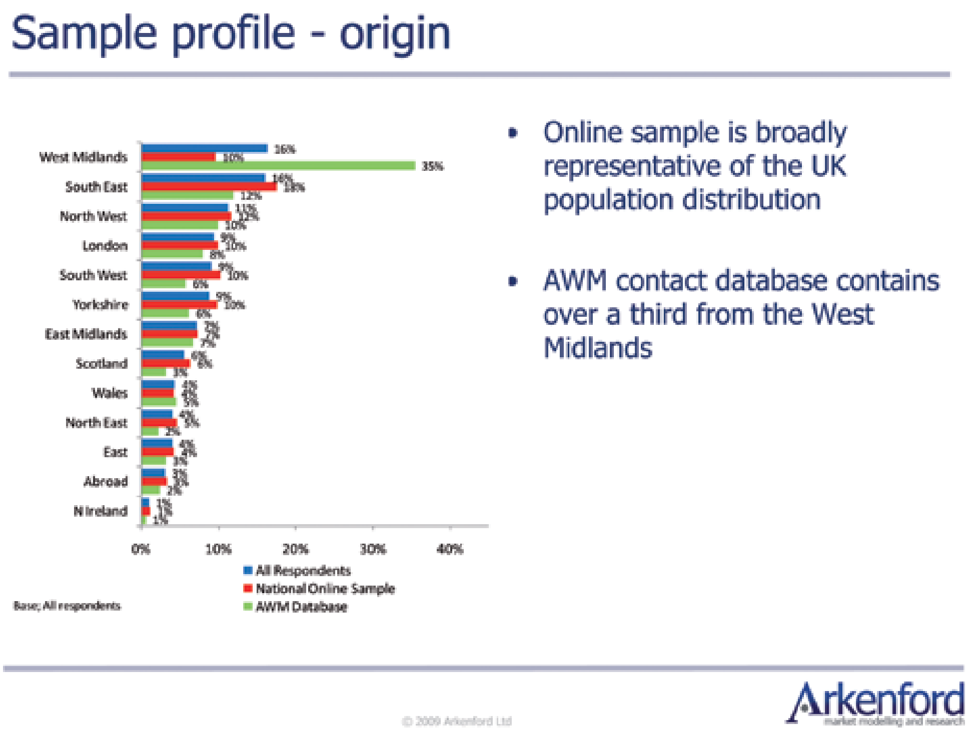


[13] But not used by the National Trust who have developed their own, but not dissimilar model



The Arkenford research on Shropshire was conducted using a 3,500 mixed age/profile online panel whose origins are as below:

Fig 8



The table at Fig 9 reflects overall awareness/disposition to consider visiting of broader destination areas, and Fig 10 of more specific places within these areas. Shropshire is shown to perform well under “would consider”.

Fig 9

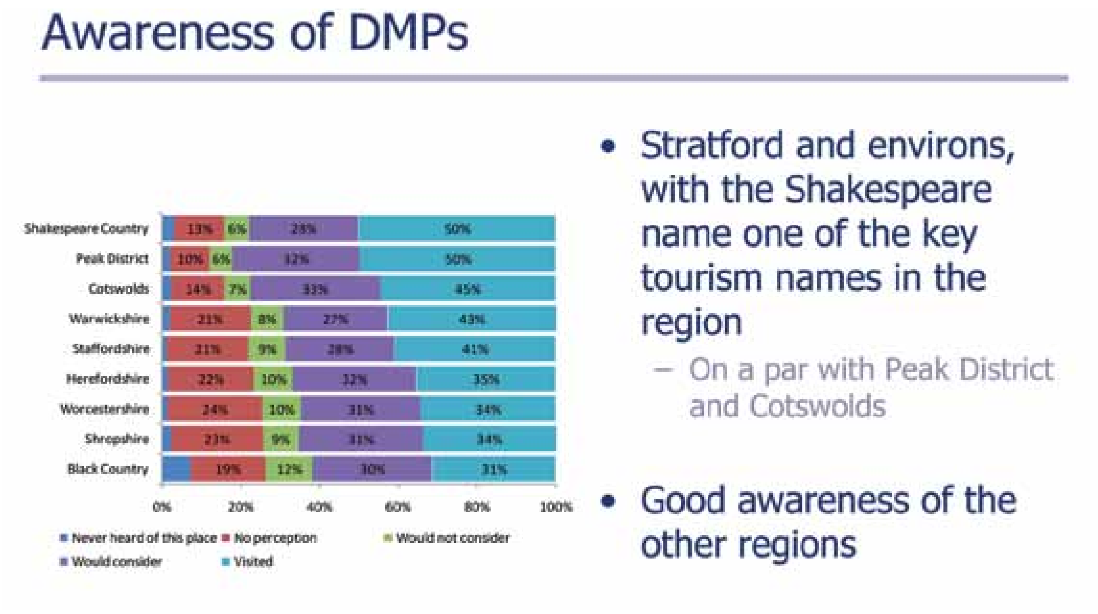
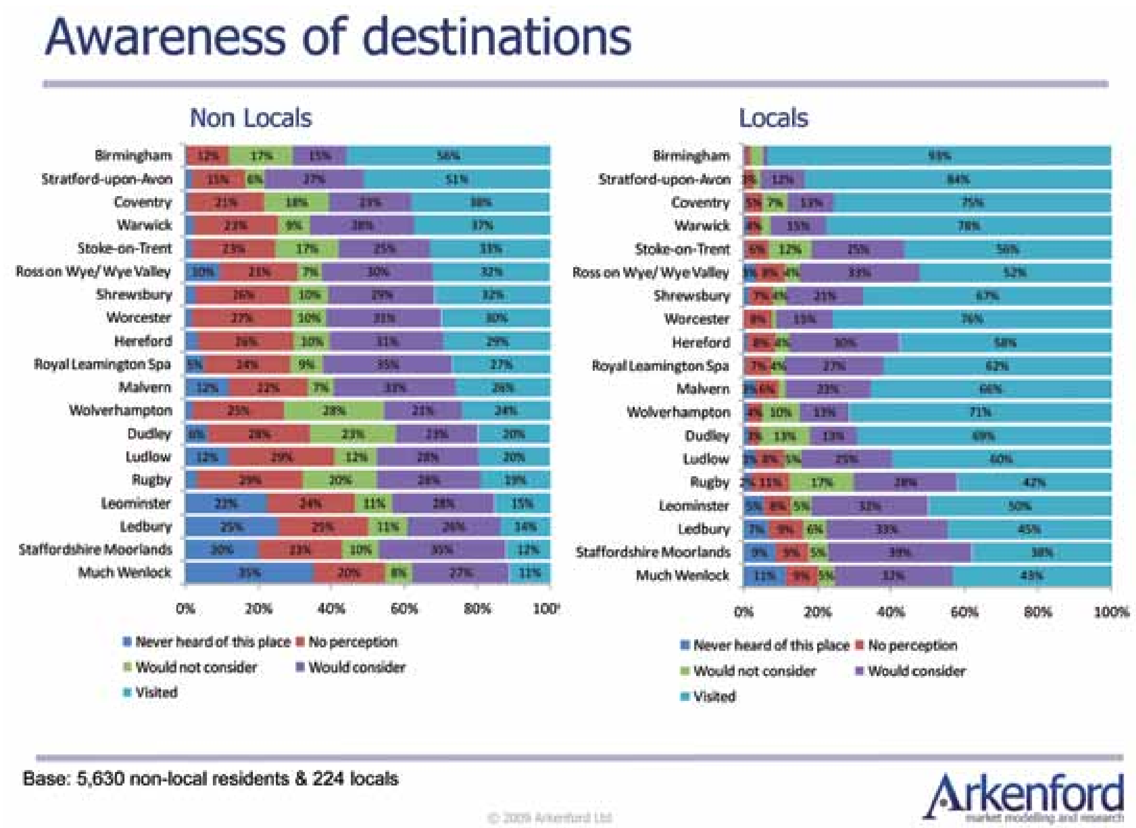
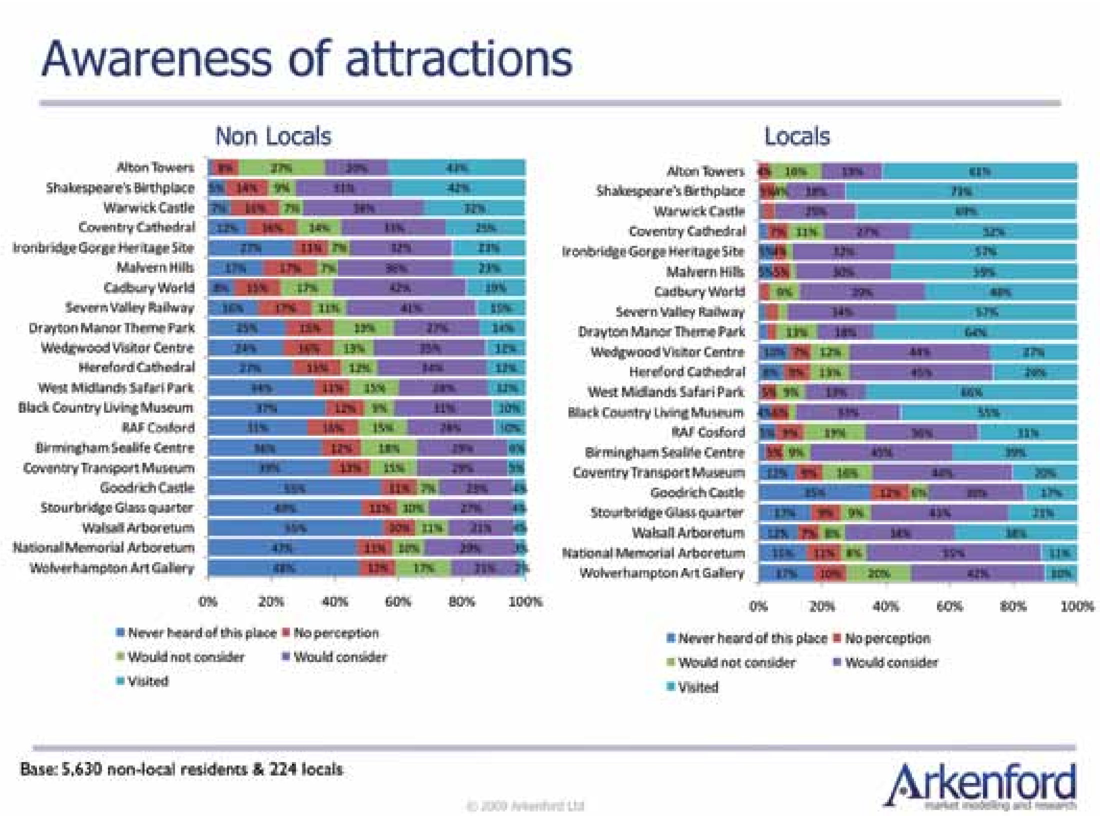


Fig 10



Only Shrewsbury and Ludlow were towns selected in the above but the next table (Fig 11) shows a range of attractions including the Ironbridge Gorge WHS (fifth down) with a respectable showing of 'would consider' but surprisingly high 'never heard of'.

Fig 11

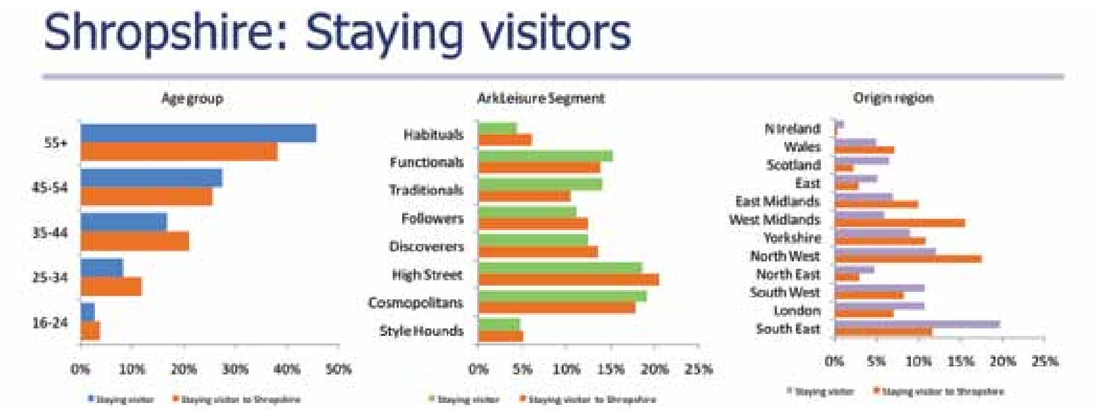


The following tables profile the day, touring and staying visitors to Shropshire by age range, motivational segments and home provenance.

Fig 12 Day Visitors

Fig 13 Touring visitors who may be staying out of the area

Fig 14 Visitors staying overnight in the area



From the above, it is clear that the day visitors are for the most part aged 45+ unsurprisingly largely from the West Midlands, but, considering transport constraints, with rather surprising numbers from London and South East and comprised of a broad segment base with High Streets unexpectedly ahead of the sought after Cosmopolitan market.

Those who are touring visitors show an increased number in the over 55 age range, a similarly segmented mix included the same strong showing of High Streets and with more coming from the South East as well as the West Midlands.

And the important staying visitors - a similar visitor profile but with the largest geo-origin from London/ SE and also showing strong growth from Yorkshire and the North West. West Midlands staying visitors are as prominent as day visitors. Functionals are consistent across all three visiting modes and again, alongside High Streets, may have been unexpectedly more prominent to readers of that survey.

So, at that time, not long after the recession started, this is what were considered to be the prospects for potential visitors to the Shropshire area, using this research and matched against the Arkleisure UK segmentation base.

Fig 15

The potential growth (Fig 15) is shown in the Functionals, High Street, Cosmopolitans and Traditionals coming from London and the South East, the West Midlands, North West and also the South West.

Arkenford also prepared a national piece of work for VisitBritain to show the match of its Arkleisure day visitor segments with the UK attractions offer[14].

This is seen in Fig 16 in which the types of attraction available in Telford and Wrekin have been added for the purpose of this report and are shaded along with the segments identified above as existing/ potential markets. It is a pity that the original study did not include parks with gardens but we may reasonably conclude that they too would match. Stately homes and transport museums have been included in this "match" due to the attractions of Weston Park, Cosford and Severn Valley Railway (SVR) bordering the destination.

This shows there is considerable scope to grow the visitation to Telford and Wrekin across the target markets and 'matched' attractions in the area.

[14] Arkenford 2009

Fig 16

Attraction type – All GB Day visitors	All	Style Hound	Cosmopolitans	High Street	Discoverers	Followers	Traditionals	Functionals	Habituals
Historic Sites and Castles	27%	8%	29%	19%	12%	7%	12%	8%	3%
National Trust Property/ Gardens	26%	6%	28%	20%	12%	9%	13%	9%	4%
Cathedrals/ Churches/ Abbeys	23%	6%	29%	21%	10%	6%	14%	9%	4%
Stately Homes and Palaces	18%	7%	30%	20%	11%	8%	13%	8%	4%
History Museums	18%	7%	31%	19%	11%	7%	12%	10%	2%
Art Collections and Galleries	17%	6%	36%	19%	10%	5%	13%	10%	2%
Science Museums	12%	10%	31%	21%	13%	7%	8%	7%	4%
Modern and Contemporary Art	11%	8%	36%	20%	11%	5%	10%	8%	2%
Family Leisure/ Theme Parks	11%	20%	28%	20%	13%	10%	4%	3%	2%
Transport Museums	9%	8%	30%	20%	9%	9%	8%	8%	7%

It is unknown how much of this insight was used in marketing and other activity in the sector at that time, by either private or public sector attractions. Evidence is certainly seen in some of the local attractions' marketing, such as IGMT, RAF Cosford and SVR, doing far more for the 'family-friendly' and the "value for money" tags although this may also have been triggered by the recession and resulting "staycation".

The 2004 Shropshire Leisure Tourism Markets Study was updated in 2008[15] and differed slightly in its analysis of the appropriate segments to target as Discoverers, Traditionals and Cosmopolitans with the overall offer of "rest and relaxation" for their time spent in the area. This had been the traditional approach for a long period and it is possible that High Streets and Functionals had not been anticipated in the face of a recession. It must be stressed that the study only covered leisure tourism and focused on the objective of increasing staying visitor markets. The study concluded with the following statements;

"Shropshire's staying markets fall into two broad categories. These are:

- Rest and relaxation – differentiated by ArkLeisure groups – traditionals, discoverers and cosmopolitans and lifestage
- Special interest groups – walkers, horse riders, event visitors etc.

[15] Shropshire Leisure Markets and Motivations Updated 2008. By TEAM for the former Tourism Research Unit based at Shropshire Council (STRU) which covered both local authorities

Weston Park

Under the ‘broad brush’ approach the core target audience should be the rest and relaxation group (the more specialist groups can be catered for with proactive targeting and should not be a priority). This is however a large group and a key question is whether to target one market within the rest and relaxation category such as Traditionals, or whether to target other groups (i.e. cosmopolitans and discoverers) as well. Traditionals make up about 12% of the UK population. It is our belief that there is plenty more of this market for Shropshire to exploit in the short to medium term. This group is likely to yield the best return on investment in terms of trips and bookings.

Our recommendation is that the core market for Shropshire should remain the “rest and relaxation traditionals”. This group is typically 46 – 64, post family, and ABC1. Core geographical areas, in terms of likely ROI, (if relevant – a lot of media is non geographic specific) would be the North West, Midlands (East and West) and East of England. Targeting this group is likely to reach other groups (e.g. the discoverers and cosmopolitans), albeit the messaging may not be as focused.[16]”

Although the study looked at the whole county it is considered that this recommendation is now somewhat inadequate for the Telford and Wrekin markets: the area as described has now gained additional appeal for families of varying ages/ motivations through its specific attractions and facilities.

[16] Ibid.

3.5 Research into perceptions and awareness of the Marches LEP area destinations 2012

In 2011/2012 Arkenford was commissioned to research the visitor markets for the component parts of the Marches LEP to identify:

- The profile (and relevance) of current visitors
- The types of trips taken
- The emerging markets
- The markets that provide best ROI
- The types of message they will respond to

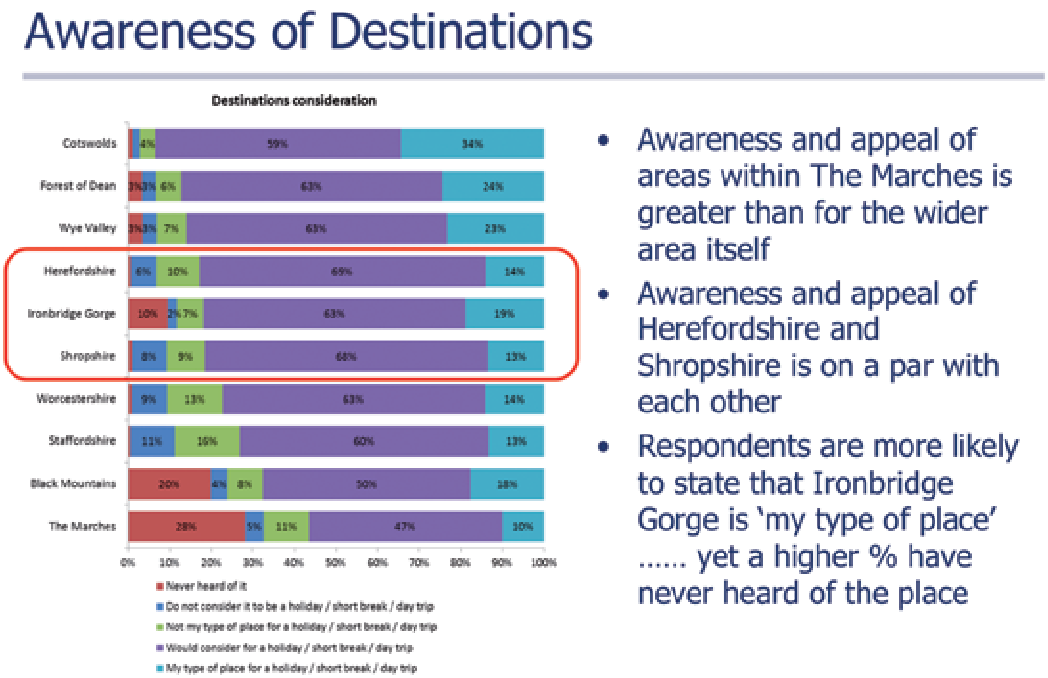
Arkenford conducted an online survey with 1502 interviews in December 2011

- 501 respondents were living within 90 minute drive time from the Marches area
- 1001 respondents were living further afield

It is timely therefore to compare, where possible, any 'like with like' progress or changes since the 2008/09 regional West Midlands survey and the TEAM motivations report already cited. This also allows a comparison with the markets previously identified as disposed to visit the area. In doing this it is important to note 2012 tables are comparing the Ironbridge Gorge (but not necessarily or specifically the Museums) with the whole County of Herefordshire and/or Shropshire (with the discomfort of not knowing if a respondent means the whole of Shropshire or not).

Top, left to right:
Severn Valley Railway;
Madeley Court; The Wrekin;
The Holiday Inn;
Wellingtom Mid Summer Fayre

Fig 17 Awareness of Destinations



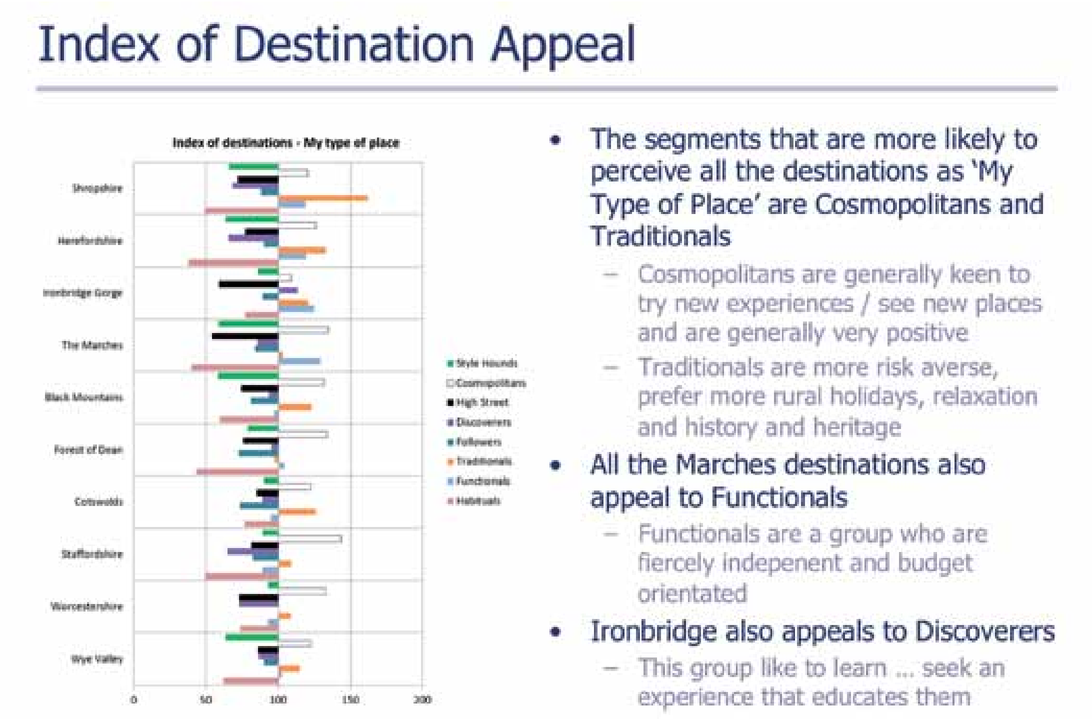
Despite the research note that a "high percent" of respondents had not heard of the Ironbridge Gorge – the very high percentage (63 %) of those who would consider it is of much greater significance. In the sample, some 43% of respondents had visited the Ironbridge Gorge which was an increase from the 08/09 survey and in common with most destinations, and reflected in the recent VisitEngland/VisitBritain Deloitte's report[17], most visitors to English destinations other than London are dominated by more local markets.

Types, length of visit and visitor appeal

The 2012 survey did not concentrate so much on assessing the market segments but rather on the perceptions of the destinations. However, their analysis shows a slight change from the 2009 picture in that High Streets have reduced in terms of "my type of place" and Functionals are more apparent, perhaps reflecting the good value aspect of the destination. This does not mean however, that High Streets are not visiting or not worth consideration due to their clear presence in the 2009 data.

[17] See section 1

Fig 18



The Ironbridge Gorge – the principal driver of leisure tourism to the Telford and Wrekin area, appears to be a greater advantage in terms of its appeal to broader market spread. Length of stay for a visit to Ironbridge was perceived more as a day trip destination or a day trip while on a touring holiday (18% + 24%) and 44% saw it as a short break destination (a slightly lower figure than the other two counties but as a single destination this is a very high rating).

In the next table at Fig 19 those who saw it as a short break perceived it as a break suitable for all kinds of family and or friends permutations and later in this section, we will see this reflected by 2013 research carried out for the Museum Trust itself.

Fig 19

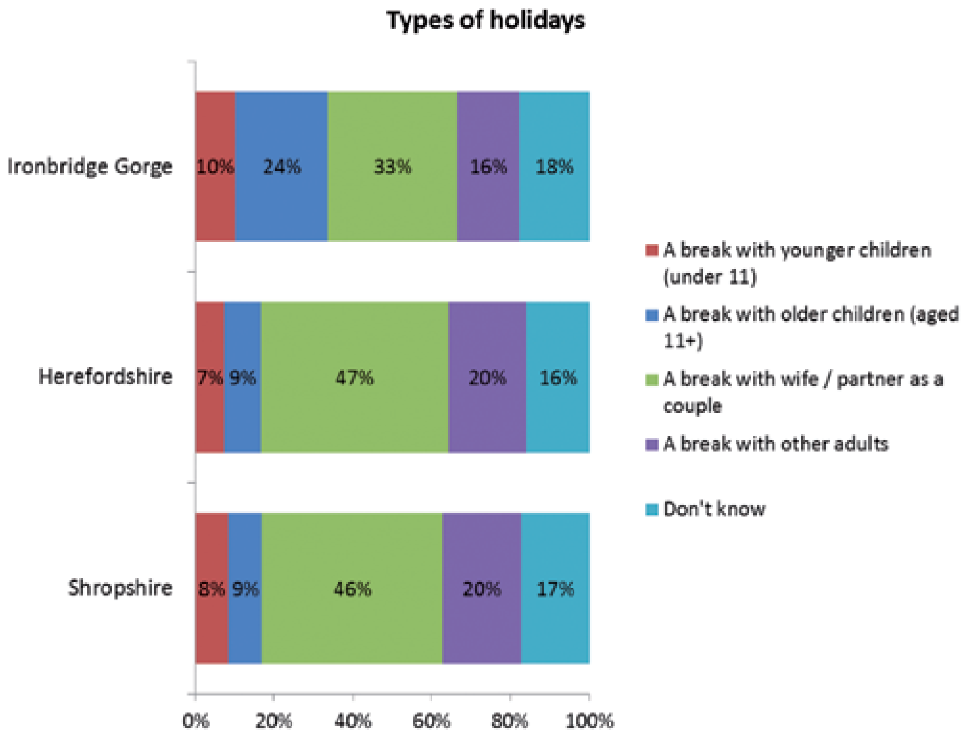
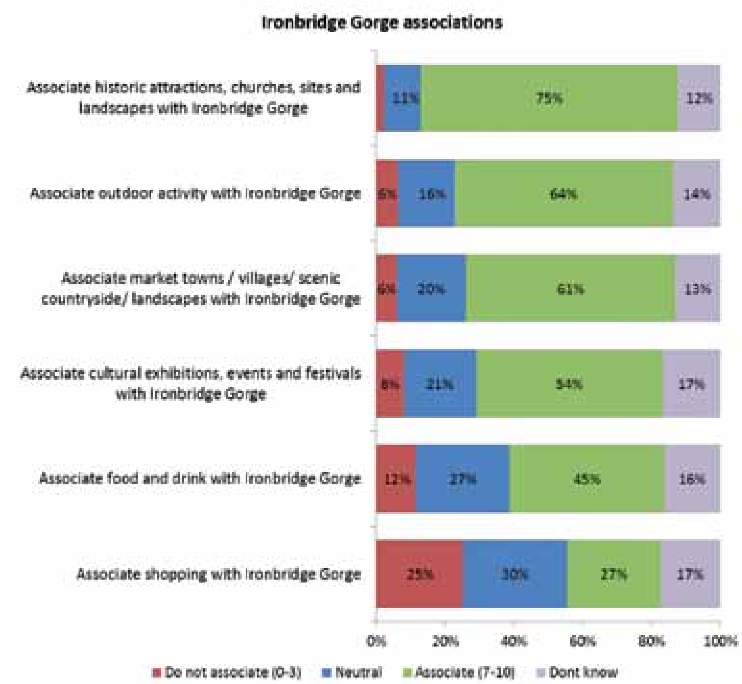


Fig 20 shows in personal motivational terms the associations respondents had when thinking of the Ironbridge Gorge, which appears to be well informed and accurate.

Fig 20



The appeal of gentle strolls, market towns, tea rooms and traditional pubs as cited by the majority of respondents as to what appealed to them is good news with much potential in the large non-urban areas of Telford and Wrekin.

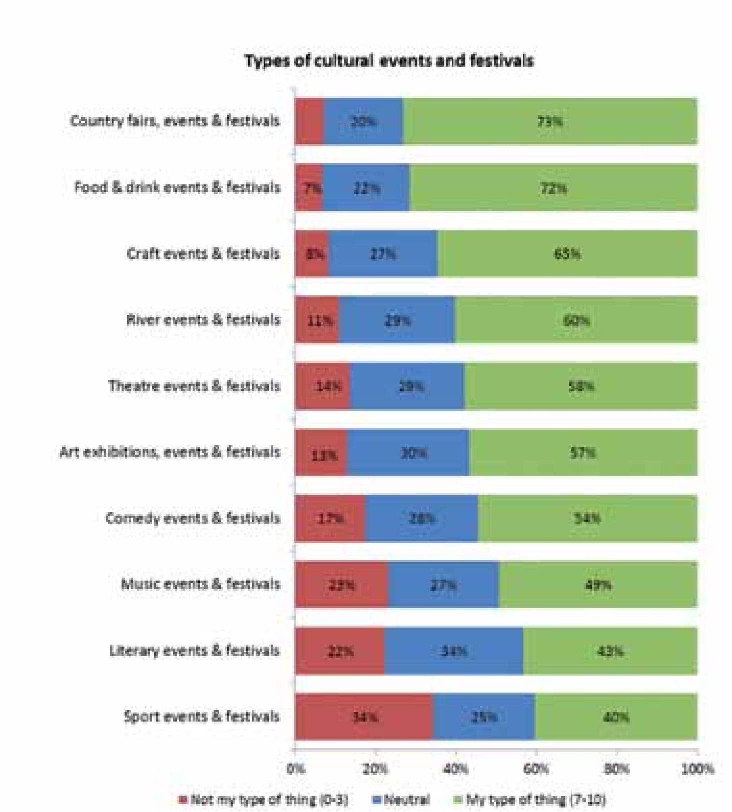
Interestingly 90% of respondents said that "River Walks" were "my type of thing" which offers a considerable potential for the destination – since the River Severn is underexploited across the whole county when compared with other destinations both home and abroad. The whole LEP area is seen as good value, safe, with much to explore and a range of quality accommodation. Most staying visitors are likely to choose an independent hotel or a B & B and self-catering is as popular as a budget chain with 1 in 5 looking for a camping option[18]. The Telford and Wrekin area has a diverse accommodation offer with good B & B choices so fits well with these audience choices.

And the good news is that the Ironbridge Gorge (and the rest of the LEP area) is seen as a year-round destination with plenty of off-peak attraction too. As history and heritage scored highly as one of the peak motivators for enjoyment (also reflected in the research into Heritage Tourism cited in section 1) it is good to see similar results mirrored in this survey, with the Ironbridge Gorge scoring 80% as a destination perceived to "offer the history and heritage you enjoy" compared to Herefordshire and Shropshire at 73% and 72% respectively.

Visitor Events

Respondents were asked to consider the types of events that they would visit and there is some potential for Telford and Wrekin as well as some cautionary insight for the future of the type of events which the destination should consider developing. See Fig 21.

Fig 21



[18] Camping may be something younger families may look for as part of a more family oriented Telford visit but there is no substantive data available and there are high quality camping options elsewhere in the county

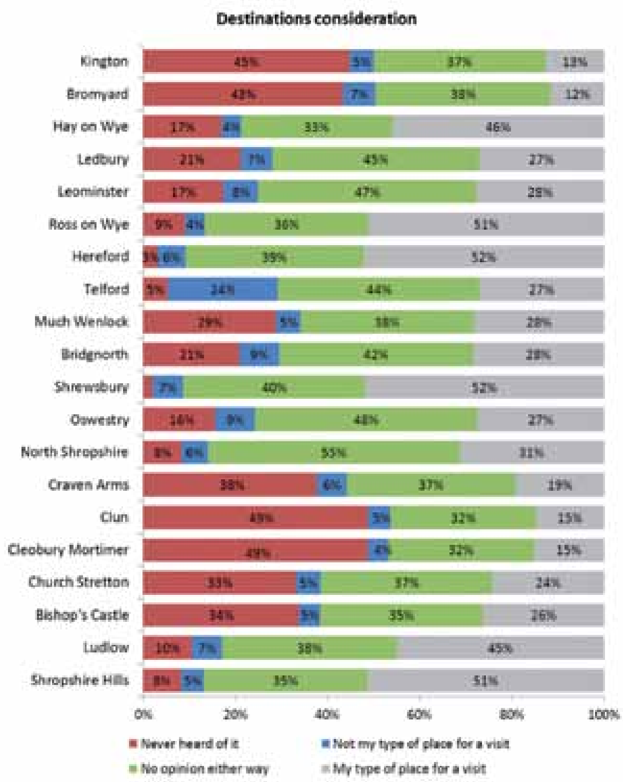
Clearly, rural shows, craft, food and drink events are very popular for some markets. And Telford and Wrekin has some of these, e.g. the Newport Show, the biggest agricultural show in the Midlands and Weston Park close by with its huge range of shows. Food and drink events are growing every year with Shrewsbury and Ludlow in the lead now but with new food and drink events planned for Newport, the T-Party staged in Telford Town Park in 2013 and planned again for 2014 (with potential to grow the quality food/drink offer and to appeal to the vintage/retro markets), and Weston Park and IGMT all staging high quality craft fairs. River events score highly and again – with the Rowing Club Coracle Regatta and the potential for more – this is clearly an opportunity not only for the Rowing Club but also for the Green Wood Centre (coracle workshops etc) and others with river related facilities/activities.

In terms of retail the study showed that 89% rated shopping as their "type of thing" but only in "*Towns with quirky / unique / independent retailers"* and also with keenness for markets, both specialist and more general, and a preference for a traditional high street offer over more up-market boutiques.

So more should be made of the various markets in Telford and Wrekin (compare with the high profile of Ludlow Market) and ensure that more is known by visitors about the independent retailers in the market towns. Interestingly the Telford Shopping Centre did not appear to have registered as an attractor in this survey reflecting the VAL measure of these tourism markets[19].

In terms of overall destination appeal (Fig 22 below) Telford sadly scored the highest under "not my type of place" but yet was on a par with Much Wenlock, Bridgnorth, Bishops Castle, Leominster and Ledbury for "my type of place for a visit". Clearly there is a lot of work to do by many to get across the relevant, if sometimes disparate, positive and distinctive features of their destinations.

Fig 22



[19] Arkleisure Values, Aspirations and Lifestyle segmentation method

But as seen in the next table at Fig 23 for attractions appeal there is high visibility for Ironbridge Gorge - in the lead as "my type of place" (and also for the Severn Valley Railway). This would appear to suggest yet again that people don't associate Ironbridge with or know that Ironbridge is in Telford.

However, it is hard not to suspect that respondents thought that Hampton Court and Grounds was the rather better known one in London than that in Herefordshire - when rating it higher than Hereford Cathedral and almost as highly as Ironbridge, a World Heritage Site with over half a million visitors? And with "never heard of" almost the same for both?

When matched with the earlier Telford and Wrekin Visitors Survey 2007/ 2008[20], the Arkenford summary of perceptions of the Telford and Wrekin area matches much of what has gone before. The table in Fig 24 aggregates the overall findings.

Fig 23

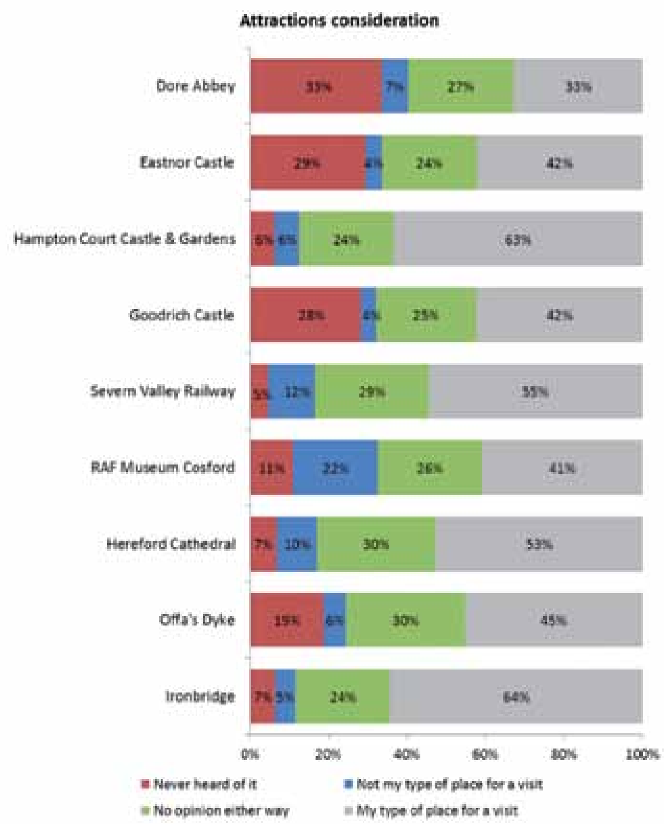


Fig 24

Location	Perceptions	Top responses
Telford and Wrekin		
	How is the area perceived?	Beautiful/Picturesque (21%)
		Good for Families/Children (17%)
		Shopping/Good choice of shops (14%)
	Spoilt Visits	Only 9% claimed spoilt and caused by: - poor weather, lack of/cost of parking - lack of/poor toilets poor/lack of signage - road works/congestion
	Repeat Visitors	Repeat Visitors (69%)
		2/5 of visitors had more than 10 visits in 5 years
	High Visitor Satisfaction	Many attractions had perfect satisfaction scores: - Telford Town Park - Severn Valley Railway - RAF Museum Cosford - Telford Steam Railway Even the lowest Satisfaction Rating was 88%.
Ironbridge Gorge Museums		
	Positive Perceptions	Nostalgic and Fun (88%)
		Offers history and heritage they enjoy (80%)
		Feel it is a year round location (56%)
		Good value for money/ not 'too touristy' (48%)
		Feel it is safe (69%)
		Offers something for the whole family (58%)
	Negative Perceptions	Expensive (37% but based on very small sample)
	Perceptions of spend related activities	Food and Drink visitors enjoy (50%)
		Shopping visitors enjoy (45%)
		Both of these are 30% lower than Shropshire
	Awareness	c9% had never heard of Ironbridge Gorge
	Visitor Satisfaction: Attractions	Highest: 95% Blists Hill Highest: Overall Quality: 97%
	Visitor Satisfaction: Local Facilities	Lowest: 89% for sign posting to attractions

[20] The Research Solution 2007/8 Visitor Survey for Telford and Wrekin Tourism

3.6 Summary of findings from leisure visitor perceptions, awareness and visitor survey research

- Cosmopolitans, Traditionals, Functionals and Discoverers (all independently minded) may have greatest potential but High Streets should not be ignored especially for the rest of the Telford and Wrekin offer
- Most (92%[21]) are looking for information for trips through internet searches and the next greatest influencer is word of mouth (62%). If word of mouth continues to be as important as ever, knowing recommendation is at the heart of Trip Advisor (simply an online version of 'word of mouth'), then quality experience of the destination is absolutely vital
- Mobile websites and apps are used both before the trip but equally during the trip - Mobile devices are now used by over half of the travelling population and more investment is needed in this, particularly mobile websites, although a significant challenge is the poor mobile signal in the Gorge and in rural Telford and Wrekin
- Printed information is more valuable when people are actually visiting than before their trip
- Encouragingly, the destination is seen as a year round offer with plenty to do, not spoilt and good value for money
- More *Discoverers* go to Ironbridge than to other parts of the LEP area and families are more important there than elsewhere in the LEP region
- 'The Marches' as a visitor proposition has no resonance with visitors – the individual destinations are what appeal i.e. the sum of the parts is less than its components
- The percentage of satisfied visitors is up since 2008/9

[21] In the IGMT research summary below, this figure is much lower

- Day visitors must be targeted even more, as well as staying visitors, as there is still big potential to grow this market as well as convert some to overnighters
- Geographic spread of visitors in the Telford and Wrekin area, across the rural and urban areas of the district is roughly split as 70% into 'town' and 20% 'countryside' day visits with the remainder overnight
- The Marches LEP destinations are still not first division/best in class/top of mind in markets so more must be done on awareness/marketing even though Ironbridge came out top in terms of "my type of place to visit" for attractions
- High levels of satisfaction from visitors is good news but can only be maintained by continual investment in product and staff, in order to match ever increasing levels of expectation from consumers

And for Telford Centre specifically the likelihood is that the new Town Centre development, (Southwater) whilst aiding the business visitor economy and reviving the local economy, will not necessarily match those well disposed leisure tourism market segments (who are already used to such facilities in other towns and cities) unless more is done to highlight the attractions of the Town Park, and its proximity to the Ironbridge Gorge to nearby market towns and the other major attractions.

Telford could and should, with its growing accommodation base, establish itself even more as an excellent "hub" for good value weekend / short breaks. The 2013 Hotel Futures study, covered later in this section concludes much the same when referring to the business markets.

Any new/existing events must be carefully thought through in terms of final perception and quality impact and the retail offer also differentiated carefully, distinguishing between mass market and the niche, independent retail offer.

Food and drink is important, but of the more artisan type rather than fast food/chains. So, maximise the local and Farmers markets, both indoor and out and use the River Severn much more to help position Telford and its assets.

And finally consider the *'Telford-on-Severn'* option to soften/upscale the town's image and locate it in the 'mind's eye' when appealing to the main leisure tourism markets.

3.7 Value and volume performance

Whilst a general 'health warning' about current research available has already been made, nonetheless some recent data informs this plan, although these mainly relate to leisure tourism. The following volume and value results for Telford and Wrekin Leisure Tourism derive from the Economic Impact Assessment for 2011[22] viz:

3.6 million trips were undertaken in Telford and Wrekin of which there were:

- 3.3 million day trips that generated £105m
- approximately 0.3 million staying trips that accounted for a total of 1.2 million nights in the area and generate approximately £55m.

This highlighted the greater value of the much sought after staying visitors[23].

These 3.6 million trips that occur in Telford and Wrekin account for an approximate spend of £160m on tourism in the area, supporting in the region of 5,617 jobs, both for local residents and for those living nearby. Approximately 4,448 direct tourism related jobs are supported and when combined with an additional 1,169 non-tourism jobs dependent upon multiplier spend from tourism, the total represents 7% of employment in the area. When averaged out and including the wider supply chain over £13m is spent in the local economy each month.

This £160m, whilst covering people who are travelling for regular business reasons/meetings, however, does not include the value which accrues to the destination from specific Business Tourism i.e. convention and exhibition business, largely but not only driven by the Telford International Centre, which hosts 120 national events p.a. and the hotels in the vicinity. Business tourism is covered later in this section.

Top, left to right: Closer to the Edge - Aerial Ropes Adventure Course, Telford Town Park; Ironbridge Gorge World Heritage Site Market; Ironbridge along the River Severn

[22] The Research Solution EIA for Telford & Wrekin & Shropshire 2011-2012
[23] Ibid. In which business travellers ARE measured but are those travelling for regular business purposes

Further tables at Fig 25 and 26 from the Economic Impact Study illustrate more specific spending and job creation:

Fig 25

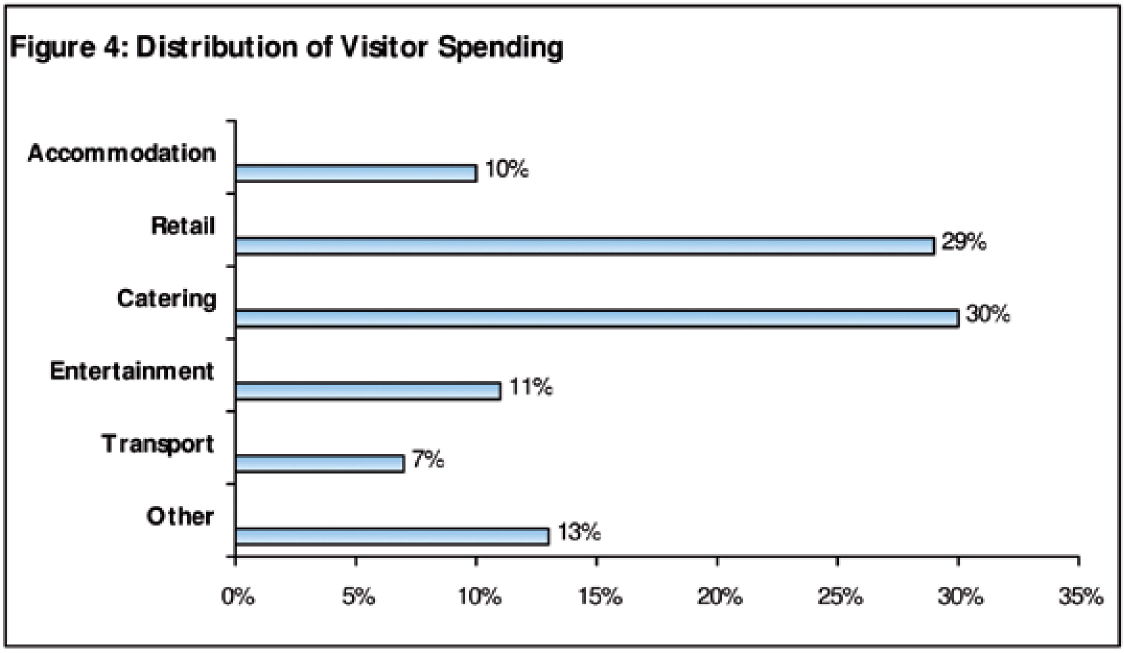
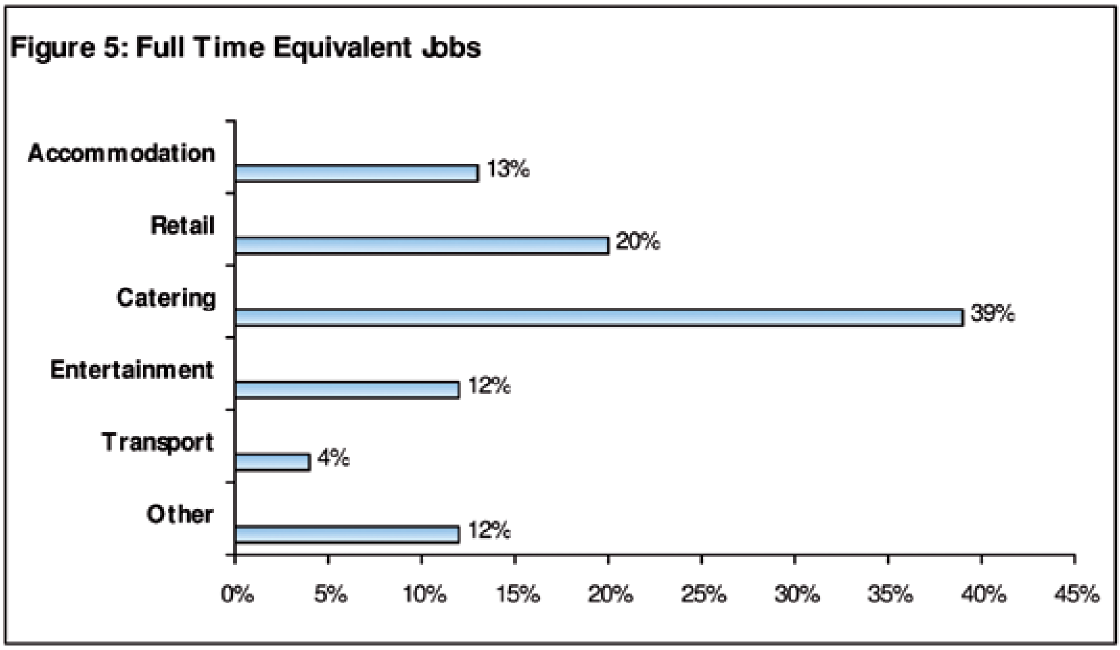


Fig 26



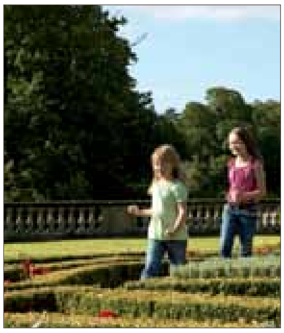
With the growth of the hospitality sector in the new Southwater development, employment in the accommodation and catering sectors is likely to increase substantially in the next few years. This is positive, but the need for suitable training (working with New College/TCAT) will be vital in order to gain the sought-after word of mouth recommendation and distinguish what are normal standard chains service from the rest. The potential for higher-skilled jobs in the sector, graduate recruitment etc must be encouraged across all Telford and Wrekin economic development activity not just in tourism.

3.8 Leisure attractions performance

The following information is derived from the attractions themselves, though not all data requested is available and it is understood that some remains commercial in confidence. With the demise of the regional tourism boards, the collection of data is more ad hoc (other than through VisitEngland resources) and it has reduced the industry's ability to monitor and benchmark its performance on a sub-national level. As was seen in section 1, the recent Deloitte data shows that London is far and away outstripping the "rest of England" rendering national averages somewhat meaningless.








Top, left to right: Jungleland; Walking up The Wrekin; Sunnycroft NT, Wellington; Telford Shopping Centre; the Italian Gardens, Weston Park; McFly in Telford Town Park

Fig 27

Attraction	Visitor Numbers	Visitor Provenance
IGMT	552,000	Mainly from 1.5-2 hour drive time ABC1C2 Family and mature couples looking for a fun day out Education value
Weston Park	250,000 of which Visitor Attraction (30,000) Events (200,000) Schools (6,000) House Business / Gallery / Granary Grill and Deli (14,000)	
RAF Cosford	313,000 (free admission)	Day visitors from West Midlands Wider for events and worldwide for aviation fans
SVR	202,000	-
Sunnycroft (NT)	19,000 aiming for 30,000	Predominantly West Midlands, Telford and Black Country 30-60 minute drive
Jungleland	119,000	
Town Park	685,000	Local/Black country
Shopping Centre	260,000 per week	Week days within 15 minute drive time Weekends - up to 30 minute drive time Demographic of customers A,B,C1, C2, D, E with weighting towards C, D and E weekdays and increased A/B at the weekend
The Place (theatre)	70,000 tickets sold across 176 ticketed events	75% local, rest Staffs/ Black Country

'Traditional' Attractions

A total of 1,455,000 visitors from 'traditional' attractions (including repeat visitors particularly likely at Cosford where entry is free of charge, at IGMT due to season ticket/friends membership and at Weston Park which also operates a season ticket).

Telford Town Centre

A total of 945,000 visitors for the Shopping Centre and Town Park – both of which will have high repeat visitation.

This rough analysis of attractions helps support some of the previous market segmentation research and is relevant to the Hotel Futures study and recommendations covered later.

Partners in this plan were asked what and how they would like to see TTP supporting the destination, and responses were:

- Securing an on-going marketing budget of £500,000 per annum.
- Repositioning Ironbridge and Telford as one of the country's 'must see' destinations, to rival Shakespeare Country and The Lake District.
- Fully understanding the challenges faced by the independent tourism industry and representing the industry at a local, regional and national government level.
- Greater integration in marketing to maximise activity – shared activities including familiarisation visits for key staff, town councils to engage more productively.
- More shared print distribution.
- More co-ordinated social media and PR.
- Opportunities for the smaller attractions to "coat-tail" on the larger.
- Improved highway signage to some facilities.
- Business support to grow shared understanding of key issues, marketing and measurement techniques.

These are taken into consideration in the Action Plan at Section 5.

3.9 The Ironbridge Gorge WHS and award winning Ironbridge Gorge Museum Trust

Acknowledged as the major driver of the Telford leisure visitor economy – highlighted by its considerable economic contribution both directly and indirectly. As such it is vital for the Museum Trust's partners to understand fully its market composition as well as its economic impact in order that all marketing and infrastructure support across the destination maximises its brand value. The Museum is an independent Trust and recognised as a Major Partner Museum by the Arts Council. The following is a brief summary of 2013 research commissioned by IGMT on its performance and markets[24]:

Visitor profile[25]

1. Over 63% of the survey had visited Ironbridge before 2012 (just 8.2% of the defined catchment area were unaware of IGMT) and the Museum has a very high awareness rate amongst residents in the wider catchments[26]
2. Key groups: adults under 50 both with and without children each accounting for four in ten visitors
3. IGMT visitors included overnighters with 25.3% staying 1-3 nights and 10.7% staying longer. This may reflect the high representation in the middle-class and higher income categories:
    - Professional Rewards[27]: experienced professionals in successful careers enjoying financial comfort in suburban or semi-rural homes (Discoverers, Cosmopolitans)
    - Rural Solitude: residents of small villages and isolated homes where farming and tourism are economic mainstays; (Traditionals, Functionals)
    - Alpha Territory: people with substantial wealth who live in the most sought after neighbourhoods. (Cosmopolitans, Discoverers)

What influenced them to visit

1. 50% decided due to prior knowledge/a previous visit internet searches and word of mouth also rated as major influences by over 25% of sample. This is much less than the Marches LEP Arkenford research.
2. 32% were influenced by advertising/media especially:
    - website for the venue - used by almost half (46.2%)
    - IGMT leaflet (25.8%)
    - TV ads (23.7%)
    - Billboards/roadside posters (7.5%) (note this can only be M6)
3. A fun day out and informal learning were key aims and 'participation/hands on' differentiators
4. 58.2% were influenced by the fact that it was a new place to visit and only 7.5% said they visited to use their annual passport ticket
5. 1/3 decided more than a month in advance, 1/3 deciding on the day or day before and 1/3 decided in the past week or month (30.8%).
6. Qualitative research showed –a "slow burn" for many respondents who had positive perceptions about it as a place for a "full" day out with lots to do/see i.e. not necessarily top of their mind but which might surface (also supported by the Arkenford research)

[24] Market Research Study for IGMT –Vector Research May 2013 supported by ACE.The study comprised a 300 sample visitor survey to the Museums backed by 450 telephone interviews on households in two spatially defined catchments i)Shropshire, Staffordshire, Black Country, North Birmingham) and ii (South Birmingham, Solihull, Coventry, Worcestershire, Warwickshire, North Oxfordshire, North Gloucestershire, Cheshire, Stockport and South Manchester. The visitor survey was conducted at three different sampling points (Blists Hill Victorian Town, Enginuity, and Coalport China Museum) over the Easter weekend. All participants were screened to have visited an attraction (e.g. a heritage site, museum, theme park etc) in the past 12 months or are considering visiting an attraction in the next 12 months. 3 focus groups took place

[25] nb the survey did not use Arkleisure segmentation which this report has tried to match

[26] stretching north to Cheshire/South Manchester and south to Gloucestershire and North Oxfordshire

[27] The descriptors used here (Professional Rewards, Rural Solitude, Alpha Territory) are those used by Vector Research and are classifications used by the Acorn/Mosaic systems

7. A more immediate "prod" from media/advertising or friends/relatives (word of mouth)
8. The final trigger of good weather, partner/spouse or children suggesting a day out on that day/ following day etc.
9. The main 'chooser' was either the respondent OR spouse – rarely both[28]. Only 1 in ten cases the children were a main influence (so pester power not so relevant here)
10. Interestingly social media – and indeed email communication – played little or no part in attracting visitors to IGM.

Visitor ratings

IGMT scores particularly positively on play facilities for children, other attractions nearby and good places to eat and drink close by.

1. Specific negatives included further cost, travel costs, merchandise and food on-site as well as quality of on-site food and drink
2. Over 2/3rd of visitors felt that it had been VERY good value
3. 55.1% were very likely to revisit and a quarter (25.2%) fairly likely to re-visit.
4. 11.6 % of visitors were unlikely to re-visit IGM, the reasons being essentially economic or practical eg seen it all, distance and only c 2% were unlikely to revisit due to the costs of entrance
5. The greatest interest in re-visiting was from the under 50s with children in the party, with 67.3 % stating that a re-visit was VERY likely
6. Key factors encouraging a re-visit were: not seen it all/size and number of attractions, annual ticket/passport, quality of museums, general interest
7. Amongst the telephone sample, 41.6% stated they were likely to visit IGM

General perceptions

1. There are very impressive levels of agreement among visitors:
   - Unique historic setting (97.3%), Good for a family visit (96.6%), great for a day out (95.8%), good for a school visit (95.1%), good places to learn (93.9%), good for children (93.8%) stimulating (93.1%)
2. More than a third (36%) of visitors stayed at least one night as a result of their visit – spending a mean of £66.25 pp on accommodation on top of £22.50 pp at the Museum excluding tickets.

Success

Ironbridge Gorge Museums has a very high level of awareness in terms of brand awareness/core attributes in the market place – and as a place which combines high quality family visits and stimulating heritage experiences. These imply that there is quite limited scope for improvement as there are relatively few unaware individuals in the identified catchment, who actively seek days out at attractions and there are no significant shortfalls in the product. The offer is a comprehensive package of history and heritage presented as a fairly diverse mix of attractions in a highly attractive and atmospheric setting though some may miss the wider setting as a result of a direct visit to Blists Hill, missing out on the actual Gorge itself.

Under-represented groups include relatively few lower income households (compared to Black Country LM) and also BME groups, despite potential within 45 mins drive time although lots come with school visits. There are few younger "urban" lifestyles – some of whom may well have strong interests in arts and culture but less in heritage but who could be attracted by the (now) "romantic" scenery and retail opportunities in certain instances *(Cosmopolitans/DINKS)*.

[28] Nationally research shows the decision normally influenced by female partner

Promotion and pricing

The combination of media the Museum is using seems to be working and the only slight surprise was the apparent low importance of social media. This may be worth further research or it may reflect the poor broadband and mobile signal in the Gorge. Pricing appears appropriate with the vast majority highly satisfied with value for money.

Potential actions for IGMT, reflected in Section 5.

1. Attempting to make inroads into new segments will be costly, possibly inefficient and may even create negative impacts for the existing core audience if the offer is diluted in any way
2. with a burgeoning BME population in the nearby West Midlands conurbation, and growing sophistication in the visitor attractions market IGMT's penetration into wider markets should follow, with genuine potential for growth such as the National Trust's work in Birmingham with hard to reach groups
3. Keep abreast of childrens'/parents' needs and expectations at the sites – alongside good practice and initiatives in interactive exhibits
4. The message of Ironbridge as a world-class site (both the Gorge and the IGM product) stressing the UNESCO World Heritage values where appropriate, has to be continually re-stated as there is still a small but significant target market between the 45 and 90 minute drive-time who are still unaware
5. Make more of the actual Gorge and add in the new SGCT walks to attract walkers or others who may stay longer
6. The annual pass is an effective initiative but only has an impact in terms of decision to visit on a relatively few, who are within reasonable drive time, and for Shropshire and Telford council tax payers there are already heavily discounted rates. There may be a way of incentivising revisits by linking with offers at nearby facilities/attractions.

Top, left to right: Coalport China Museum;
Tile making at Jackfield Tile Museum;
Blist Hill Victorian Town's Visitor Centre; Enginuity;
Fireworks over The Iron Bridge

3.10 Business Tourism – Meet Telford & Shropshire

Meet Telford & Shropshire is the official Convention Bureau for the destination, responsible for a national marketing, pr, sales and business development campaign. Activity includes:

Marketing Campaign

The ‘Be Inspired’ campaign profiles and repositions the destination with 4 thematic sub campaigns to promote the destination to the UK MICE market, that are Stand out (Meeting, Convention and Events), Reach out (Team Building and Incentives), Chill out (Hospitality) and Time out (Visitor experience apres event). The campaign was absorbed into web, online, pre, social media and print marketing.

Website: www.meet-telford.co.uk attracts 1000 buyer visitors per month with a focus on a tell and sell approach providing a one stop shop of information on the destination for the buyer. This includes a range of online resources to assist buyers in organising an event including a Venue Finder and Venue and Service Directory.

Print and Brochures: 2000 x 3 Thematic Guides as well as a digital version reached over 7000 buyers. Following segmentation of the existing MICE buyer database of over 12000. While successful in terms of market response it was recognised that the central Event Planners guide approach was much more cost effective and with the move towards targeting larger events and agents it was vital to have one core print piece that positioned the offer more strongly.

Social Media: Meet Telford & Shropshire developed their presence in 2013 on social media via Twitter and You Tube with plans to develop in 2014/15 a further presence on Linkedin, Pintrest and Instagram. The twitter account has 500 followers with 600 tweets focused on changing perceptions

Top, left to right: RAF Museum Cosford; Plastics Exhibithion at The International Centre; Welcome at Weston Park

and reaching new markets particularly those with low awareness of the destination.

E Marketing: Developed our key e marketing update to the buyers in 2013 under the banner Meet Telford & Shropshire Latest. Sent out 4 times a year to a circulation of 13,000 it focuses on sharing the latest news, reviews and what’s new and coming soon in the destination. The e campaign helped to cleanse our database and allowed us to develop a profiled buyer database of 2480 records.

Press and PR: The PR campaign focuses on placed and sold in PR only generated directly by Meet Telford & Shropshire and is not based on overall destination PR from partners:

- PR Value of Business Tourism Coverage = £267,831
- Opportunity to see coverage+ 3.5 million Event Buyers
- 89% of Press releases and activities converted to actual coverage
- Secured coverage in National MICE publications and online to value of £89,277 (advertising equivalent terms)
- 3 National MICE Press Visits where secured in 2013

Sales and Business Development: In 2013 the focus on Event Sales and Event Support was emerging with 8 major events supported. Direct bids brought in major new events including PDM, Plastics Recyclers Europe and the European Archery Championships. There are currently 22 convention bid leads researched and being processed through the Event Bid service. In 2014 Meet Telford & Shropshire launched an Event Bid service and Ambassador programme that focuses on targeting the Major Events Sector -large scale industry and association events with a high net worth and high visitor volume.

Conclusions

Over the last 5 years with the emergence of new media and with over 75% of the European MICE market is now buying as a result of web marketing the use of the Conference Desk service, once a primary service of the bureau has reduced demand and in its place the role of the Convention Bureau has become more focused as both as an online resource for small to medium size events and for large scale events through an Event Bid service. In 2014 a new online enquiry facility will be developed to facilitate and generate increased business direct to members.

3.11 Business tourism markets, volume & value, perceptions and awareness in Telford and Shropshire

Ten years ago Business Tourism was recognised as one of the key GDP drivers of the Telford economy. The 2004 Economic Impact/ Volume and Value Study evaluated the MICE sectors to the destination of Telford and Shropshire. At that time it was estimated that for every £1 spent at TIC, £12 was spent in the local economy. 51% of events business was from the South East and 23% from the West Midlands. A targeted Business Tourism Action plan which was supported until 2007 through regional activity by the then Regional Development Agency, largely focused on Birmingham and Coventry.

However, up to date intelligence on the sector is limited and dated and does not reflect the current market[29], particularly given the significant changes to the fabric , capacity and breadth of offer through recent major investment in local venues and the changes in buyer behaviour since 2008/9. Benchmarking the volume, value and performance of the market is therefore difficult. However, some provides the basis on which to evaluate the market and for commitment to better future research and subsequent investment[30].

Key changes since 2004:

- Capacity growth of the event venues increasing the potential to win, stage and retain large scale conventions and expos . Two TIC expansions have increased capacity to 4000 (from 2000 in 2004) with 15,000sqm of event space, resulting in higher volumes, higher visitor spend and increased Association business
- New venue offers[31] expanding the breadth and depth of the destination offer, including the development of new hotels and unusual venues
- Expansion of some existing venues[32] to increase capacity to host events both in terms of event space and residential accommodation.
- Funding of Business Tourism down from maximum of £200k pa (share of RDA-ERDF West Midlands campaign) in 2007 to £30k in 2008/9.

Over 5000 events were staged across Telford & Shropshire in 2004 across some 94 fixed venues of which 40 are in T & W, including conferences, exhibitions, seminars and small meetings. Ten years later updated figures are needed. For example, TIC alone now stages 120 national events and welcomes 200,000 delegates per annum.

Perception and awareness of Telford and Shropshire as a conference location

Conference and event buyers knowledge of and attitude to Telford & Shropshire as a venue for conferences, as well as of the conference desk and other factors were assessed in the 2008/9 perceptions survey. The study undertook telephone interviews with 25 organisers who had previously used Telford and Shropshire and an online survey of 354 organisers across the UK. The study compared results where relevant with the earlier 2003/4 study cited earlier.

- 45% of respondents had poor destination knowledge
- 23% described their knowledge as average.
- Knowledge levels amongst Telford and Shropshire venue users were higher but even here nearly 1 in 7 (15%) of them described their knowledge as poor.

[29] 2003/4 Business Tourism EIA in Telford and Wrekin by TEAM. funded through ERDF
[30] 2009 The Tourism Company Perceptions of Telford & Shropshire as a Conference location, and 2013 Telford Hotel Futures Study.
[31] E.g RAF Museum Cosford, Hundred House, IGMT
[32] E.g Q Hotel, Hadley Park Hotel, IGMT et al

Fig 29

Source of info	Total Sample (n=287)
Websites	75%
Word of mouth	64%
Personal/ fam. visits	54%
Search engines	48%
Brochures (on file/in library)	33%
Industry exhibitions/trade shows	30%
Directories or guides	29%
Own/ in-house database	29%
Conference Blue and Green book	28%
Venue finding agency	24%
Venuefinder.com	20%
Conference bureau website	16%
TICs	15%
BACD Venue finding service	14%
Direct mail	11%
Conference bureau (by phone)	7%
Other	6%

- Internet dominated the sources
- 75% cited websites as key source
- 64% said they regularly use word of mouth recommendation in selecting venues.
- 54% used fam. visits or personal visit to venues as a way of deciding on venues.
- 33%) used brochures kept on file or in a library
- 16% of respondents had used a bureau or destination website.

Fig 30 Knowledge and use of Conference desk

***Table 17** Awareness of Telford and Shropshire Conferences (prior to taking survey)*

	Total Sample (n=305)	T & S users (n=40)
Yes	36%	45%
No	55%	45%
Not sure	9%	10%

Sample size (total sample) = 305. This question was included for the first time in the 2008 survey.

***Table 18** Ever used the help and assistance of Telford and Shropshire Conferences?*

	Total Sample (n=312)	T & S users (n=40)
Yes	7%	18%
No	87%	75%
Not sure	6%	8%

Sample size (total sample) =312. This question was included for the first time in the 2008 survey.

***Table 20** Reasons for non-use of Telford and Shropshire Conferences*

Reason	Total sample (n=280)
Not looking for venues in the Telford and Shropshire area	56%
Prefer to do my own research	24%
Don't use venue finding services/conference bureaux	16%
Have all the information I need already	3%
Don't know what services they offer	21%
Prefer to deal with venues direct	23%
Other	13%

- 36% of Buyers aware of the service
- 55% had no awareness
- Only 7% of Buyers used the service
- Buyers using the service rated it highly as Very Good (75%) and Excellent (25%)

The most relevant perceptions and awareness results have been pulled together in the following table as a summary of various research over 2008 and 2009[33]. Associated findings from the recent Hotel study of late 2013[34] which are relevant to the overall business tourism sector at a more operational level also follow.

[33] Perceptions of Telford and Shropshire as a Conference Location, December 2008 – The Tourism Company, Perceptions of the West Midlands 2009: Views from Businesses in England and Overseas, July 2009 – IPOS
[34] Telford Hotel Futures Report Fact File 2014 by Hotel Solutions

Fig 31

Location	Perceptions	
West Midlands	Awareness	43% do not know or have no awareness of the West Midlands
	Business Events	58% would consider the West Mids as a conference location
	Regional Perceptions	Central location Declining industry Poor Environment; highly urban, 'Black Country'
Shropshire	County Perceptions	Picturesque Remote and inaccessible for conference users - had to be convinced of accessibility
Telford	Awareness: Conference Organisers 'Meet Telford and Shropshire' campaign	No Awareness (16.5%) High Awareness (83.5%) 'Remote'/'Not Central' (20%) 2011 – 77 Conference organisers invited to Telford to see the conference and exhibition facilities 95% of invitees would consider using Telford as a conference location in the future
	Satisfaction	Overall Satisfaction (86%) Would recommend venue to others (TIC) (96%)
	Key areas for influencing the destination of a conference (2008 figures)	Telford performs well in 4/5: ■ Access by Road (54%) ■ Cost and Value for Money (53%) ■ Quality of Hotels (47%) ■ Location (45%) ■ Telford perceived to perform poorly in: ■ Access by rail and air (20%)
	Negative Perceptions: Percentage of Conference organisers	Nightlife and restaurants (16%) Access by Air (20%) Leisure Facilities and Things to do (29%) Availability of Interesting and Unusual Venues (33%)
	Perceptions of Key Area's Performance	No 4 or 5 star hotels (there are two 4* hotels) No conference location has sufficient accommodation: Hotel with most accommodation has 141 rooms and conference capacity for 440
	Lack of Accommodation	Lack of Accommodation by TIC despite International Hotel 23 events lost at TIC in 7 months due to lack of accommodation
	Overall	Slightly tarnished by 'New Town' status – seen as soulless and dominated by cars No unique feature, 'no heart' or identity Increasingly negative opinion In 4 years, 32% less would definitely short list Telford as a conference location

The 2008/9 study asked a range of conference organisers for their views about Telford as a conference venue. The range of 'importance' factors cited by earlier studies and national research was tested against how Telford was perceived and the following shows that there is still much work to do to raise the positive knowledge/awareness of the reality of the Telford product. The very low perception of night life should in future be solved by the Southwater developments, but what will matter is how this is communicated to organisers.

Fig 32

Table 11 Comparison of Performance of Telford & Shropshire with importance on factors involved in selection of conference venues and/or location

Factor	T & S performance % exc or v good* (n=300)	Importance rating % v. or quite important
Easy access by road	54%	92%
Cost and value for money	53%	96%
Type of venue *(e.g. hotel, conference centre)*	47%	87%
Quality of hotel accommodation	45%	%%
Size and capacity of venue	43%	94%
Range and variety of hotel accommodation	39%	74%
Type of location *(e.g. city centre/rural)*	37%	89%
Easy access by rail	37%	84%
Availability of interesting and unusual venues	33%	53%
Leisure facilities and things to do in the area	29%	35%
Easy access by air	20%	84%
Nightlife and restaurants	16%	25%

The Research highlighted the lack of knowledge by organisers as one of the key issues as to why they actually couldn't rate or choose the area. It is worth pointing out how much the budget for business tourism has fallen, but this is unlikely to change, other than through EU funding, and thus any remedial actions must be realistic. There is clearly a great need, despite all the work that has been done previously on PR with regional partners and substantial funding that was allocated until 2010, to ramp up all communications on the following:

- Product knowledge – facts about the accommodation available, the night time improvements (but being realistic in that this brings Telford up to standards which already exist elsewhere), the interesting and unusual venues in the area and even the proximity of Cosford or other airfields for private air travel.

3.12 Summary of findings from business tourism perceptions and awareness

The perceptions and awareness research of 2008 did not vary significantly from that of 2004 but where it did there are pointers to action. In particular, it appeared that a lower proportion of respondents had come into contact with Telford and Shropshire Conference marketing initiatives than was the case in 2004. Also, although there was lower outright rejection of the area as a possible venue for conferences in the future, respondents appeared less willing than in 2004 to consider the area as a possible venue for future events. This could also be due to greater competition in the marketplace, conference organisers being more risk averse to try new locations or organisers having less time to explore new venues.

The main challenge remains raising awareness of the area in the marketplace and then delivering excellence. As was the case in 2004, respondents to the online survey and interviewees in the telephone survey often didn't have sufficient knowledge of what was an offer to be able to form a judgement on the area's suitability for events. There must therefore be continued investment in promotional activity that seeks to raise awareness of the area if there is to be any discernable shift in perception levels in the long term.

The recent growth in both the TIC itself as well as the whole Southwater development will provide a huge opportunity to re-launch the Telford central venue(s) and thus the area too, stressing those key factors which find favour with most respondees who know the area – central location, value for money, ease of access. These elements should form a cornerstone of all business tourism-related communication about the area. The longed-for and promised direct train service to London has failed to materialise in the way that would benefit most business markets and although there is still a long way to go to improve access to the Town Centre/TIC from Telford station, the station itself is somewhat improved. Taxi training (linked to licensing) is desperately needed (and is in the Action Plan) to ensure that business visitors receive the best arrival possible – especially if Telford is a first time venue choice. With more businesses in the centre and potential EU funds it should not be impossible to create a decent joint budget to fund a suitable campaign and to engage more partners in transport and public realm.

The market no longer sees any benefits in a conference desk as technology has made direct access, ease of viewing even with virtual 'show-rounds' and the wealth of venues available at the click of a mouse. It appeared that both usage and awareness levels of the Telford and Shropshire conference desk still remains quite low and there is evidence that simply raising awareness of it would not necessarily lead to greater usage. This is because there appears to be a general desire amongst organisers to deal direct with venues rather than use an intermediary. Fears about commission and not knowing what advantage would be gained by using an intermediary were common reasons given for non-use.

The predilection of organisers to deal direct with venues offers an opportunity to use these venues as conduits for Telford and Shropshire marketing activity. Dealing direct with venues will remain the preferred route for most organisers). Meet Telford & Shropshire therefore needs to be part of the relationship that venues have with event organisers in order to communicate the wider business tourism message about the area. There may be sensitivities about competition between venues but these should be surmountable given the potential to grow overall levels of business through co-operation amongst venues.

Meet Telford & Shropshire are better using staff knowledge and time to focus resources into two key areas:

1. winning more business for the destination as a whole through bidding or collaboration with other partners in the area
2. providing active support for organisers and the events that do happen in Telford ensuring higher word of mouth recommendation, greater multiplier impact and also exploit clear linkages with leisure tourism to try and get repeat business for both activities.

Above: Park Inn, Telford
Below: Best Western Valley Hotel, Ironbridge

3.13 The Telford hotel study

This up to date study, completed in February 2014 provides both a snapshop of the sector and its performance and also a recommended approach for the future. Relevant extracts from the study are thus included here to complement the Business Tourism scenario and support the Action Plan in Section 5.

Hotel Supply in Telford and Wrekin

- Telford and Wrekin has 24 hotels with 1,293 letting bedrooms
- Principally of 3 star and budget/limited service standard
- In the last 5 years Telford has invested in new hotel development with 4 new hotels, adding 167 bedrooms at budget and 3 star levels
- Investment in hotel supply has improved the overall quality of Telford's hotel offer
- 2 new hotels are at development stage - 85 bedroom Premier Inn at Telford Town Centre and 27 room Marston's Inn at Hadley Park
- Telford Town Centre (Telford Central) has the largest concentration of hotel accommodation – 5 hotels with 556 bedrooms, accounting for 43% of the District's total hotel supply
- There is only one hotel in Ironbridge – the Best Western Valley Hotel with 44 bedrooms - alongside 10 inns that offer a combined total of 67 letting bedrooms and a plethora of B&B accomodation
- The Newport area is served by 3 hotels with 76 bedrooms and 3 inns with 26 bedrooms
- Wellington has 5 hotels with 167 bedrooms and 3 inns with 24 bedrooms
- Shifnal has 3 hotels with 139 bedrooms and 2 inns with 12 bedrooms

- 4 new hotels have opened in the past five years adding 167 new rooms to the Telford and Wrekin hotel supply, primarily at the 3 star but also including a boutique hotel
- Changes of ownership and/or re-brandings to 6 of Telford's hotels over the past 5 years, introducing additional national and international brands to the District's hotel offer
- One hotel has closed during the past 5 years - the Charlton Arms at Wellington (22 bedrooms) - which was granted change of use to residential
- There are 6 proposals for new hotels that are currently unimplemented - three of these have incorporated hotels as part of wider schemes, one of the proposals is for another hotel in the town centre at Southwater (in addition to the new Premier Inn) and the remainder are in edge of centre or out of centre locations.

Fig 33 Current hotel supply by standard/type of hotel October 2013

Standard	Hotels	Rooms	% of Rooms
4 star	2	168	13.0
Boutique	1	7	0.6
3 star	9	697	53.9
2 star	1	32	2.5
Budget/ Limited Service	6	321	24.8
Ungraded	5	68	5.2
Total Hotels	24	1293	100

Fig 34 Hotels locations across area

Location	Hotels	Rooms	% of Rooms
Telford Central	5	556	43.0
Telford North (Oakengates, Donnington, Hadley, Muxton)	4	86	6.7
Wellington	5	167	12.9
The Wrekin	1	62	4.8
Telford South (Madeley, Sutton Heights)	2	163	12.6
Ironbridge	1	44	3.4
Shifnal	3	139	10.7
Newport area	3	76	5.9
Total Hotels	24	1293	100

Fig 35 Hotels locations across area

Location/ Standard of Hotel	Average Annual Room Occupancy %				Average Annual Achieved Room Rate[2] £				Average Annual Revpar[3] £			
	2010	2011	2012	2012YTD[4]	2010	2011	2012	2012YTD[4]	2010	2011	2012	2012YTD[4]
UK Provincial 3/4 Star Chain Hotels[1]	68.9	69.6	70.3	72.3[4]	68.01	68.40	69.39	70.49[4]	46.88	47.61	48.38	50.93[4]
Telford 3/4 Star Hotels	61.2	61	61.8	65.6	50.33	50.25	51.18	51.28	30.83	30.63	31.63	33.66
Telford Budget Hotels	n/a	n/a	n/a	75.4	n/a	n/a	n/a	47.54	n/a	n/a	n/a	36.42

Notes

1. Source: TRI Hotstats UK Chain Hotels Market Review
2. The amount of rooms revenue (excluding food and beverage income) that hotels achieve per occupied room net of VAT, breakfast (if included) and discounts and commission charges.
3. The amount of rooms revenue (excluding food and beverage income) that hotels achieve per available room net of VAT, breakfast (if included) and discounts and commission charges
4. Year to date September 2013

Fig 36 Weekend occupancy performance

Showing plenty of scope for more growth of packaged leisure short breaks which in the long term will drive up revpar and awareness of area, creating virtuous circle for the destination.

Standard of Hotel	Typical Room Occupancy %	
	Mon-Thurs	Fri-Sun
3/4 Star	73	60
Budget	85	73

Hotel Performance Issues:

- Telford is performing below national provincial averages for 3 and 4 star hotels
- Achieved room rates (ARR) were below national average at £51 compared to £70
- Occupancy is at 65% compared to 72% nationally

Local Hotel Market Strengths:

- Budget hotel occupancies are high at 75% with an ARR of £47
- Midweek occupancies and ARR for Telford 3/4 star hotels are much stronger than at weekends. Midweek demand is therefore strong with Tuesdays and Wednesdays the highest performing nights

Local Hotel Market Challenges/ Opportunities:

- Corporate demand and events business demand is price sensitive
- Sharp spikes in demand are delivered via major events staged in Telford
- Denied business happens generally during the time major events are happening
- As weekend demand is relatively weak and largely low rated it is an opportunity for better marketing and exploitation of the short breaks market

Future Considerations:

- Most Telford hotel managers expect their hotels to see a slight upturn in occupancy in 2014 but no improvement in achieved room rates and in some cases a drop with the majority of hotels continuing to pursue strategies to boost occupancies in 2014
- The general view is that the Telford hotel market will remain very price competitive, with limited scope to grow room rates - growth in occupancy is likely to come through lower-rated markets, including leisure business driven by online travel agents and group tours
- Some hotels also see potential in terms of corporate growth as the economy strengthens through corporate, association conferences and weddings
- A few hotels are starting to switch to rate-led strategies as they feel that their occupancies have built to the maximum that can realistically be achieved in the Telford market
- It would appear there is considerable scope to Increase the weekend short break leisure market where at present there is average 60% occupancy.

Conclusions:

While Telford is to see substantial levels of growth through to 2031 the currently weak performance of existing hotels dictates that a period of recovery may be needed.

Like many other parts of the country, Telford's hotels have faced difficult trading conditions over the past 5 years as a result of the recession, its impact upon levels of corporate and conference demand, combined with the new supply which has come on stream over this period. The overall performance levels being achieved by Telford hotels demonstrate that there is a possible over-supply for 3/4 star accommodation.

Recommendations:

The short term focus should therefore be on building the market, with regeneration and investment in the destination, and particular focus on growing demand in the corporate business travel, business events in the high value Association sector and leisure business through group travel, tour and discounted leisure break trade driven through online travel agents and daily deals sites. The successful application of this strategy will lead to further hotel development in the long term.

Wider Destination Considerations for the Hotel Market:

The Invest in Telford Strategy and Shaping Places Local Plan will influence what happens in the wider business economy and shape future proposals for hotel recovery, growth and development:

- Telford is to see substantial levels of growth with 26,000 new homes, 12,000 new jobs and a population increase of 30,000 - 45,000
- Telford Town Centre will be a focus of growth, particularly around the Southwater regeneration scheme and the Sovereign Land shopping centre re-development which between them will deliver £450m of new investment
- Good long term prospects for corporate market and business stay growth
- High growth potential in the Business Events sector through Association business
- TIC working with Meet Telford & Shropshire are targeting major growth through multi stay Association and Industry conference market (long stay, high value volume)
- Lack of Telford central/on-site 4 Star hotel accommodation is restricting higher-rated large capacity corporate conference business
- Growth in leisure business for Telford hotels will be primarily in terms of group tour business and discounted leisure break trade driven through online travel agents and daily deals sites – weekend break market could be value-added working with partners
- Prospects for growth in hotel demand related to population increases, contractor stays linked to new developments, are good
- It is unlikely that the Southwater development will in itself be a draw for leisure break customers, but it has the potential to enhance Telford as a location for conferences, exhibitions and events, which should generate new business for the town's hotels
- There is possible scope for the development of serviced apartments in Telford Town Centre. An aparthotel could also be considered as an alternative to a 3 or 4 star hotel at Southwater. With their focus on long stay corporate demand, the lack of weekend business in Telford would be less of an issue for these types of accommodation.

In Newport, Wellington, nearby Shifnal and Ironbridge the market is unlikely to be able to support new build hotel development on any scale but the potential here is more likely to be extensions to existing hotels, inns and pub accommodation plus scope for some establishments to upgrade, including possible repositioning as boutique accommodation in some cases. However, there is likely to be considerable growth in new housing and employment in the Newport and Shifnal areas in the next few years which could open up considerable potential. The growth and profile of Harper Adams University with government interest and support and big international markets is another factor which may influence growth in both HE itself as well as the accommodation sector.

In the rural parts of Telford and Wrekin there could be potential for the development of a destination hotel such as a country house hotel or golf hotel, given a suitable property for conversion or site for development. It is worth noting the future development of the Wappenshall Wharf heritage site with a likely £1m lottery investment which could start to increase visitors to the rural areas in the longer term.

3.14 Product Development

The following table reviews the current product in terms of development currently taking place or planned for the future, as matched to the needs and markets above.

Fig 37

Indicators: Achieved, In Progress, Future	Status
Attractions and Place Development	
1 Closer to the Edge Rope Course in Telford Town Park	Achieved
2 New Visitor Centre in Telford Town Park	Achieved
3 New Family Play facilities in Telford Town Park	Achieved
4 New mini golf facility in Telford Town Park	In progress
5 Three designated learning zones developed in Telford Town Park with heritage and nature trails to be completed to connect them all in spring 2014	In progress
6 Telford Cycle Centre – Bike Hire opened in Telford Town Park	Achieved
7 Pathways and Cycle route improvements connecting to Ironbridge Gorge WHS	In progress
8 Weston Park – development of new Deli and Café for day visitors	Achieved
9 RAF Museum Cosford – development of exhibition around the famous Dornier aircraft	Future
10 Madeley – Development of Visitor Information Point and Town Trail	Achieved
11 New walks and trails in the Severn Gorge Countryside Trust to be launched Spring 2014 : ■ The Iron Trail leaflet and a new video showing the prospective visitor its key highlights. ■ A brand new much more user friendly SGCT website, explaining its work managing just over half of the landscape of the IGWHS, including new videos ■ A new Lime Trail exploring Benthall Edge from the Iron Bridge and visiting the two lime kilns recently restored at a cost of £70,000 ■ A Sabbath Walks Trail (based on extensive research commissioned in 1999 and 2002 by SGCT) exploring possibly one of the UK's first ever formally laid out publicly accessible parks, Dale Coppice and the best viewpoint of the World Heritage Site from the Rotunda high up on Lincoln Hill ■ An Ironbridge to Blists Hill Victorian Town Trail via Lloyds Coppice, past Bedlam Furnaces, Lloyds Pumping House and the remains of Madeley Wood Hall, encouraging visitors to walk from Ironbridge to Blists Hill Museum along a safe attractive woodland walk, rather than at risk along the road and up Legges Way.	Achieved
12 Newport – new Tourism Action Plan prepared	In progress

Indicators: Achieved, In Progress, Future	Status
13 Wellington - Tourism Action Plan	In progress
14 Range of new galleries and attractors in Ironbridge Gorge Museums: John Scott Gallery at Jackfield, new coverbuildings/interpretation for The Trevithick, Icebreaker and tubboat, The Spry at Blists Hill, redevelopment of Museum of Iron	In progress
Accommodation and Venues	
1 Park Inn, Telford - £4million refurbishment	Achieved
2 Lilleshall National Sports and Conference Centre - £9m and Battle Back Centre	Achieved
3 Marston Hotel with Rooms (Hadley Park East - 2013)	In progress
4 Holiday Inn refurbishment ongoing	Achieved/ In progress
5 Grays Hotel and Conference Centre rebranding to Ramada Global – bedroom refurbishment	Achieved
6 Best Western Valley - Next phase will be an additional 24 bedrooms	Future
7 Hadley Park House Hotel – plan to refurbish original hotel bedrooms and possible upgrade to 4 star	Future
8 Madeley Court - Refurbishment as part of rebranding to Mercure (2011)	Achieved
9 Premier Inn Telford Central - opening 2014 82 bedrooms	In progress
10 Travelodge Telford – bedroom upgrade (2013)	Achieved
11 Buckatree Hall – refurbishment (2013) / New meeting room; private dining room and mini-gym currently under development	Achieved
12 Expansion of The International Centre to 15,000sqm event space	Achieved
Southwater Development	
1 Southwater 1 – iconic heart of new Telford Town Centre (Spring 2014)	In progress
2 Hotel development including Premier Inn (as above) and outline permission for 1 further hotel	In progress/ Future
3 Restaurants – development of dining culture (Spring 2014)	In progress
4 Entertainment – development of IMAX cinema and Bars (Spring 2014)	In progress
5 Outdoor – seamless connection to 450 acre Town Park (Spring 2014)	In progress
6 Development of Public realm including iconic art and urban beach (Spring 2014)	In progress
7 Complemented by £200 million Telford Shopping Centre development masterplan	Future
Partnerships and Collaboration	
1 Shropshire Star Tourism & Leisure Awards - development of Awards connected to Visit England	Achieved
2 Telford and Shropshire Hoteliers Group - Collaborative working and sharing best practice between hoteliers	In progress
3 Shropshire's Star Attractions - Collaborative promotion of the destination including attendance at Trade Shows/Exhibitions targeting the day visitors and group bookings	In progress

Indicators: Achieved, In Progress, Future	Status
4 Marches Local Enterprise Partnership - Cross LEP working on business and leisure tourism including research and developing a joint approach to EU funding opportunities	In progress
Transport and Infrastructure	
1 Park and Ride - An investment of just under £1m has been made in a 250 space park and ride site to cover Ironbridge	Achieved
2 Silkin Way - An £850k (2012-14) investment to upgrade the Silkin Way route between Telford Town Centre and the Ironbridge Gorge World Heritage Site	In progress
3 Telford - Newport - Stafford Cycle Route - A rolling programme of investment (£450k) has started between Telford, Newport and Stafford to create a new on / off road cycle route	In progress
4 Train Station Refurbishment - £1million refurbishment of Telford Central railway station	Achieved
5 Box Road Improvements - Started in 2013 the £11.8m scheme is set to improve traffic flow and access for pedestrians and cyclists between the £250m Southwater development and Telford Shopping Centre	In progress
6 Gorge Stabilisation Phase 2 - Jackfield / Coalport New Bridge / Maws	In progress
Funding	
1 Cultural Tourism bid via Visit England and Arts Council 2013	In progress
2 Development of European Structural Fund Projects 2014 – 2020	In progress
3 Business development funding to support Tourism SME'S	In progress
4 Redundant Building Grant to support diversification	In progress
Festivals and Events: **Public**	
1 Development of the Arena for Concerts, Festivals and Events – T-Party(Weekend Family Event)	In progress
2 T-Live (Pop Concert)first large scale public events took place in summer 2013 / similar events planned for summer 2014	In progress
3 Wellington (Walkers are Welcome) developing Walking Festival (annual)	Achieved / In progress
4 Newport Nocturne (biennial)	Achieved / In progress
5 Queen Victoria Cross (cycling), Ironbridge	Achieved / In progress
6 Ironbridge Gorge World Heritage Festival, Ironbridge Walking Festival (annual) now achieved Walkers are Welcome status	Achieved / In progress
7 Newport Street fairs/St Gorge's Day events/new food and drink event/ale festival etc	In progress

Indicators: Achieved, In Progress, Future	Status
Festivals and Events: **Business/Trade events**	
1 Mobility Roadshow	Achieved
2 FIT Show	Achieved
3 British Cheerleading	Achieved
4 Pro Retail	Achieved
5 Rotary	Achieved
6 PDM 2013 (booked for 2014)	Achieved / Future
7 Pre 2014 (new in 2014)	Achieved
8 BCA booked for 3 years	Future
9 European Archery Festival 2014	Future
10 23 Bids in process covering all 10 key destination sectors worth £8m plus	In progress
Festivals and Events: **Skills and People**	
1 Supporting the development of TCAT/New College Hospitality Centres and liaison with tourism businesses	In progress
2 Working with other leading academic centres to develop skills programmes for Tourism and Hospitality	In progress
3 Workplace learning initiative	Need to check
4 Working with Southwater development investors to support local recruitment and skills development	Future

3.15 Strengths, weaknesses, opportunities and threats analysis

In order to 'read across' from the foregoing performance data and conclusions it is important to analyse the product and its inherent strengths and opportunities as well as possible negatives. The following SWOT has been produced (which may not be exhaustive) in order to ensure that the final action plan provides for as much positive exploitation and mitigation as is realistically possible, given the current level of resourcing, concentrating on those opportunities which will match and grow the markets identified as most disposed to visit and creating good returns on investment in order to create more resource for future marketing business development and support.

In Section 4, the SWOT is complemented by the Product Development overview which, combined with the SWOT analysis, contributes to the over-riding priorities for the partnership and the destination.

Strengths and weaknesses

Strengths	Weaknesses
Destination Assets	Profile, Identity and Perceptions
■ The Ironbridge Gorge World Heritage Site, listed in 2013 by Trip Advisor as the second most recommended World Heritage Site globally ■ The Ironbridge Gorge Museum Trust (IGMT) – its ten museums devoted to interpreting the birthplace of the industrial revolution, attracts over 550,000 visitors a year, strong profile and marketing/awareness/reputation ■ IGMT is a National Partner Museum of the Arts Council of England (ACE) ■ The River Severn –and the 6 miles of the Severn Gorge itself – landscape and free access to walks and trails –and excellent conservation and landscape care ■ The Severn Gorge Countryside Trust (SGCT) management of the Gorge, its work on conservation and promotion including 4 new trails launched in spring 2014 explaining the geology/landscape and which complements the South Telford Heritage Trail ■ The Wrekin and Ercall – the northern part of the Shropshire Hills AONB	■ Profile of the destination is generally weak – perceptions of "Telford" retain lingering negative connotations of soulless new towns with no heart ■ Continuing issue around the Telford/Shropshire identity: "Shropshireness" softens the name for leisure markets but may make it seem more remote for business ■ Ironbridge and Telford are connected physically but perceived as separate: Ironbridge still not perceived as part of Telford ■ No investment in collaborative marketing activity ■ No clear identity currently in place with consistent messages in the marketplace ■ Neither Telford nor Ironbridge nor Shropshire are VisitEngland 'attack brands' and there are none west of Birmingham ■ Lack of clearly defined 'USP' for the Telford and Wrekin market towns

Strengths

- Two market towns with visitor attractors, markets, independent retail and free parking:
  - Wellington at the foot of the Wrekin, its market is one of the oldest in England, the Literary Festival, Midsummer Fayre/Carnival, and Sunnycroft – a National Trust Edwardian property
  - Newport, rural market town full of independent traders, market, blue plaque heritage trail and festivals and events including the renowned Newport Show (biggest agricultural show in Midlands) , the Newport Nocturne bicycle race, Old Tyme Market/Carnival
- Large rural area/villages mostly untapped as yet for tourism
- "Thomas Telford's Wappenshall Wharf" now received large HLF grant for development (SNCT)
- The Telford International Centre. One of the UK's top ten convention centres hosting over 200,000 delegates a year and 120 events and exhibitions including many annual repeat conventions/events
- £250m redevelopment of the Telford Town Centre adjacent to the TIC creating a convention quarter and with bars, restaurants, hotels, new state of the art digital library, renewed ice rink, spaces for arts performances , pop up art and information point
- Sovereign Land will undertake a £200million redevelopment of Telford Shopping Centre with new retail, catering and leisure uses as well as improved links to the rest of the town centre and its gateways
- Telford Town Park and the new arena and other facilities following its £2.5m investment
- The M54 linking Telford directly into the national motorway network
- Telford Train station with direct service to Birmingham or into Wales, Chester. New direct service to London starting in 2014. Wellington train station: close to Wrekin and direct access to town itself
- The seasonal Gorge Connect bus service linking train station to Ironbridge

Weaknesses

Visitor Issues

- Largely driven by day visitor market (like most English destinations)
- Low levels of overnight /extended stays from the current visitor market
- Hotel occupancy rate lower than Midlands average
- Lower than average revenue per available hotel room
- No boutique/5* hotels
- Insufficient communication/understanding of opportunities between town councils and parishes, small attractions

Gateways and Welcome

- Poor front of house / welcome across the destination outside of immediate control e.g. taxi services
- Telford Train Station welcome isn't good enough and its location presents a problem when accessing the destination's products especially the Town Centre
- Wellington station still issues around cleanliness and safety
- Public transport links could be better and support a wider green agenda with poor links connecting Ironbridge Gorge to Telford Town Centre, making it harder for visitors without a car, other than during Gorge Connect period
- Inconsistent signposting outside of the Gorge

Research and Intelligence

- Out of date / inconsistent research
- Lack of resource for more regular collective destination research
- Lack of clarity re working with Shropshire

Strengths	Weaknesses

Education
- Harper Adams University (HAU) centre of excellence, land-based HE with high numbers of overseas students and accommodation available in vacations
- HAU's Regional Food Academy
- Priorslee Hall campus of Wolverhampton University, includes accommodation in vacations
- Wrekin College – senior boarding, international and UK students, substantial facilities sporting and cultural, also Adams Grammar School, Newport High for Girls bringing parents and friends into the area from outside
- Telford College (TCAT) and New College – both in Wellington, both developing high quality hospitality training facilities including a training kitchen and hotel restaurant
- Wide Ranging Events: e.g. the World Heritage Festival, Brass Band Festival, Newport Show, seasonal and calendar events across the whole destination and bordering attractions
 	
Working in Partnership
- Public private sector partnership in place with commitment from both to develop and grow the visitor economy:
  - Shropshire's Star Attractions Group
  - IGMT a member of the Heart of England Attractions Group
  - Ironbridge WHS Steering Group
  - Ironbridge Trader's Association
  - Shropshire Walking Group and Walkers are Welcome status in Wellington and Ironbridge
  - Bridgnorth Area Tourism Action Group
	Skills Development and Tourism Organisation
	- The tourism sector is still perceived as a poor employer, with low wages and poor career opportunities.
	- Some basic skills still lacking in parts of the sector especially IT, yield management, performance management, exploitation of research findings
	- Tourism sector needs to participate in higher management skills/cultural leadership such as the Clore Programme, as well as less senior training programmes especially yield management
	- Better and integrated social media, extended IT solutions and innovation need deploying across the Telford and Wrekin tourism sector
	- Fragmented marketing effort and lack of cohesion
	- Insufficient exploitation/knowledge of major and future events across the area
	- Insufficient partnership working with HE sector to aid skills
	- Inconsistent staffing and frequent reorganisation of tourism teams at Telford and Wrekin Council
	- Reduced business support for tourism businesses
	  - Bridgnorth Area Tourism Action Group
	  - Wellington Town Council
	  - Severn Gorge Countryside Trust

Strengths	Weaknesses
Existing Visitor Satisfaction High Satisfaction of Visitors, especially to Ironbridge Gorge, many making repeat visits to the area. Business Tourists are highly satisfied with their overall experience and 96% would recommend the area to others **Value and Volume** - Telford and Wrekin visitor economy is worth approximately £259 million pa in Telford and Wrekin and attracts 3.6 million visitors a year. It is the 3rd largest employer in the area, representing 9% of Telford's businesses - Strong day visitor market	

Bridgnorth

QEII Arena, Telford Town Park

Opportunities and threats

Opportunities

Business Tourism Association Market

- Boom in Association market: UK Association sector one of the most robust and sustainable.
- Association Events sector trend towards seeking destinations offering the ultimate "Delegate Experience"
- Trend towards fewer but larger capacity events moving regularly around is good opportunity for gaining major events
- Many associations moving out of London:
  - increasing opportunity for major Conference Towns in the regions to drive new major events business.
  - more buyers use mobile communication to search, price and book their meeting space
  - Corporate market recovery in the multi -ay staff and team events area
  - Telford can gain from value and cost consciousness in corporate buyers
  - event technology including live streaming means events are able to reach larger audiences
  - New trend in Meet-centives area: with motivational events/team building + incentives = two events in 1.

National Trends

- Recession has Increased domestic Tourism with 12m fewer visits abroad since 2009
- Grow the day visitor market and extend the staying market

Threats

National Factors

- The recession continues to have an effect on general consumer spending and confidence.
- Hospitality business sector often excluded from bank loans and may not invest in their product
- Increases in fuel prices (both petrol and heating) has meant possible reductions in days out and short breaks, and increased fuel bills have resulted in business profits being squeezed further

Physical Factors

- Instability of the Gorge – risk of landslip or more and/or not remediated in the end despite all engineering works
- Road system in the Gorge, narrow and difficult for visitors
- Impact of flooding and other weather systems
- Loss of quality if Gorge fails to gain funds for necessary investment – possible threat to WHS status
- Poor quality standards of conservation and insufficient monitoring of private sector actions on listed buildings/conservation area issues eg loss of walls, plastic windows, encroachment for parking bays etc

Responding to Customer Needs

- Failure to keep up to date with intelligence, IT opportunities or other trends

Opportunities	Threats
Business Support	**Funding and Resources**
■ Experienced Tourism Business Support Officer to improve quality of local product and support tourism businesses to increase and improve productivity ■ Development of on-line business support tools and access to webinars etc. ■ EU Business Support	■ Managing the impact of local authority savings and cuts which have reduced resources: staffing and development budgets ■ Continued lack of regular tourism research and insight ■ Failure to attract funding ■ Changes to local structures and loss of engagement with private sector partners ■ Failure of Telford Tourism Partnership as the strategic body ■ Competition for tightened consumer budgets and disposable income ■ Lack of integration amongst various relevant bodies ■ Poor communications and loss of ability to maximise assets ■ Not achieving ERDF funds for required projects ■ Lack of civic pride ■ Lack of resources ■ Lack of skilled personnel ■ Lack of political support/recognition of the visitor economy's importance
Investment ■ The Southwater development phase 1 complete spring 2014 as above ■ IMAX cinema ■ £200 million Telford Shopping Centre masterplan as above ■ Development of a high quality environment refurbishment in Ironbridge town (IGMT HLF bid) ■ New developments at IGMT – Blists Hill, Jackfield in 2014 and Museum of Iron 2015 ■ Telford Town Park –making a stronger connection to the Southwater development and exploiting more opportunities for events etc ■ HLF funding now achieved for the "Thomas Telford's Wappenshall Wharf" as above. New visitor attraction: opening up potential to grow rural visitor economy ■ The ongoing investment made by the SGCT towards the tourism offer which includes around £1.5 million invested in access infrastructure and historic structure conservation, £1 million per annum in landscape management, and £1 million in community and volunteering development.	

Opportunities	Threats
Accommodation and Venues ■ Reinvestment in existing hotels and encouraging growth –see Hotel Study actions **Trends and Influencing Factors** ■ Growth of vertical and extended/serial families and an ageing population ■ Exponential growth of online services, purchasing and marketing ■ New technology to promote heritage and tourism and interpretation techniques **Festivals and Events** ■ Grow appropriate festivals and events as indicated in research ■ Large scale association events and potential economic impact **Transport** ■ Direct rail link to London – improving access and opening markets/packaging potential **Funding** ■ EU funding opportunities 2014-2020 **Wayfinding and Visitor Information** ■ Improvements to wayfinding in and around the town centre and out to the main gateways including the links from the train station ■ Visitor Information provision in Telford Town Centre	

Opportunities	Threats
Working in Partnership ▪ Working with VisitEngland to raise the profile of the destination ▪ Use anniversaries to create more interest in area ▪ Partnership working across the Marches LEP to maximise resources e.g. outdoor/natural environment – new markets ▪ Work with bordering destinations ▪ Maximising cross working with business and leisure tourism ▪ Share data and insight ▪ Better communication across all partners ▪ Better exploit Harper Adams connections and professional associations **Borough Towns** ▪ Develop the borough towns' offers that complement the wider destination offer e.g. Newport Tourism Action Plan to deliver/promote festivals and events, markets, Newport Show, retail, food and drink, walking and cycling, Wellington Tourism Plan, Walking Festival (WaW), market, events, link with the Wrekin and new owners of Halfway House Development of the Wrekin Hill offer/activities/ working with Shropshire Wildlife Trust and the Wrekin Forest Partnership	

4 Key findings & strategic priorities

4.1 Leisure and business tourism - overall picture

The Ironbridge Gorge is an international icon and World Heritage Site with global appeal, and the Museum Trust is both nationally and internationally respected, although overseas visitor markets have never risen above 6% in the past decades. With well over half a million visits per annum and a quarter of them overnighters, IGMT is clearly a brand lead for the area, with smaller attractions and the hospitality sector slipstreaming in its reputation.

Employment in the visitor economy was shown to be as high as 9% (when including the multiplier effects) and this will increase with the new hospitality businesses coming on stream in the Southwater development. It will be vital to ensure significant training in both customer service but also local product knowledge in order to create excellent word of mouth and online recommendation in the future, especially in the well known chains. The Shrewsbury Riverside Premier Inn has shown the way on this, and it is to be hoped something similar will happen in Telford town centre.

Telford as a destination place name for leisure markets finds less favour with those markets most identified as rating Ironbridge and the rural counties surrounding it as “my type of place”, as has been the case for many years. Recognising this, the Tourism Partnership has traditionally led with Ironbridge as the lead proposition for leisure markets; and in some instances, town centre hotels have also sub-branded their location names with Ironbridge as an indicator (Holiday Inn, Ramada) just as some airports link names with famous names or more attractive destinations nearby eg John Lennon Airport, .

The ‘Telford’ moniker for business tourism is clearly still suffering from lack of awareness/no perception or negative perceptions and also in some cases a lack of knowledge of the area leading to an ability to recommend or sell it to third party clients. For both leisure and business markets, it is clear that even after many years of “awareness campaigns” there is little or no external understanding that Ironbridge is part of Telford.

And there is a still a very considerable lack of positive exploitation of the University status and global reputation of Harper Adams both in the rural area itself as well as Telford and Wrekin as a whole. Shropshire Council is working hard to gain an Higher Education Institution; Telford has one, but has yet to capitalise on it to mutual benefit, for high growth jobs and associated brand values.

With over 5000 events coming to the destination every year welcoming 200,000 delegates, there is great scope to send each of those delegates home with a good understanding as well as positive perception of what Telford actually offers, to create word of mouth recommendation and, through collaborative marketing with partners, the destination’s profile will also be raised in the MICE sector to grow the Agent and Corporate events market.

The long standing dilemma of perceptions and confusion about the name of the place as opposed to the name of the Council still does not help with overall perceptions and it is surely, by now, time to grasp the initiative and consider a proper rebrand, with options on the table, at least for the leisure markets, of Telford-on-Severn or Telford-under-Wrekin, allowing external audiences to understand the geographic location and positive juxtoposition of urban and rural - with the well known and attractive River Severn softening and beautifying the formerly 'Telford new town' name. Aligning it with other attractive destinations which carry a riverside tag, such as Stratford-upon-Avon, Henley-on-Thames, Bradford-upon-Avon etc would do no harm whatsoever[35]. Such a rebrand would also have the added merit of providing wide-ranging national PR benefiting inward investment as well as the visitor economy.

It is at least worth acknowledging that a lot of money has been spent over many years on trying to improve the perception and understanding of the name Telford, to little or no effect and it surely must be worthwhile to consider the options.

The PR coverage gained for leisure tourism is impressive yet based on a very small spend. Coverage was gained in national titles and there is clearly an appetite amongst the press to write about the area. When combined with the work done as well by the Shropshire visitor economy team under the pan-LEP ACE-funded "Renaissance" marketing in 2012-3, a compelling and attractive visitor proposition has been jointly presented to the national consumer, despite political boundaries. And this is what the tourism industry wants to see. Visitors do not care about political boundaries: they want good quality, value for money and memorable experiences.

In the longer term, therefore, the aim for both the domestic leisure and business visitor markets is to increase profitable, overnight and short break visits to the destination by increased focus and investment in collaborative marketing, PR campaigns and consistent product development and improvement across both the public and private sectors. As a reminder, in 2011 the total number of nights spent in Telford and Wrekin amounted to 1,186,000, dominated by those visiting friends or relatives/ taking short holidays (total of 76%). With over 3 million day visitors, even a small percentage converted to overnight would increase the value per annum considerably.

Research has shown that the unknowing 'virgin' visitor is always surprised by the huge range of things to see and do in this relatively small area, but at the moment the "attract and disperse" model is not being effectively deployed: that is to say that in both leisure and business tourism, the two brand leaders of IGMT and the TIC are successfully bringing in their visitors but these visitors are generally not dispersing into other parts of the Telford and Wrekin, eg the Market towns and rural villages, as much as could be desired[36]. What we do know however, is that staying visitors in the county as a whole nearly all visit, reciprocally, the "golden triangle" of Ludlow, Shrewsbury and Ironbridge Gorge[37].

The Telford central 'proposition' needs to "wrap" - attractively and compellingly - the Town Park with the Ice Rink, Wonderland, Closer to the Edge, Imax/ Cinema and the shopping offer - especially to those family groups who will also visit other family attractions in the area as well as IGMT[38]. The demonstrated capacity of the Telford central hotels at weekends is an obvious opportunity for a major campaign aimed at half terms and summer holiday weekends.

For business tourism to succeed in Telford, the town has to think like a Conference Town: its services, its infrastructure, and most of all, its people all have to recognise how much they will benefit if Telford begins to attract even a fraction of the kind of conference business that Brighton, Harrogate, Southport and others do. The town has to look good and work effectively to make it easy and pleasant for delegates to arrive, spend time and money.

[35] Former British Waterways research showed that water, whether rivers or canals, add at least 12% to property values and VE research shows that water associations add value to destinations. Flooding notwithstanding!

[36] As shown in the differentiated visitor pattern between rural and urban visits in Fig xx in Section 3

[37] Previous visitor studies by STRU, T & W and Shropshire Tourism going back to 2004's Tourism Action Plan

[38] Previous "Destination Telford" campaigns still suffered from the perception issue but such a family proposition, with the new/revamped products, could-if executed with style - work well

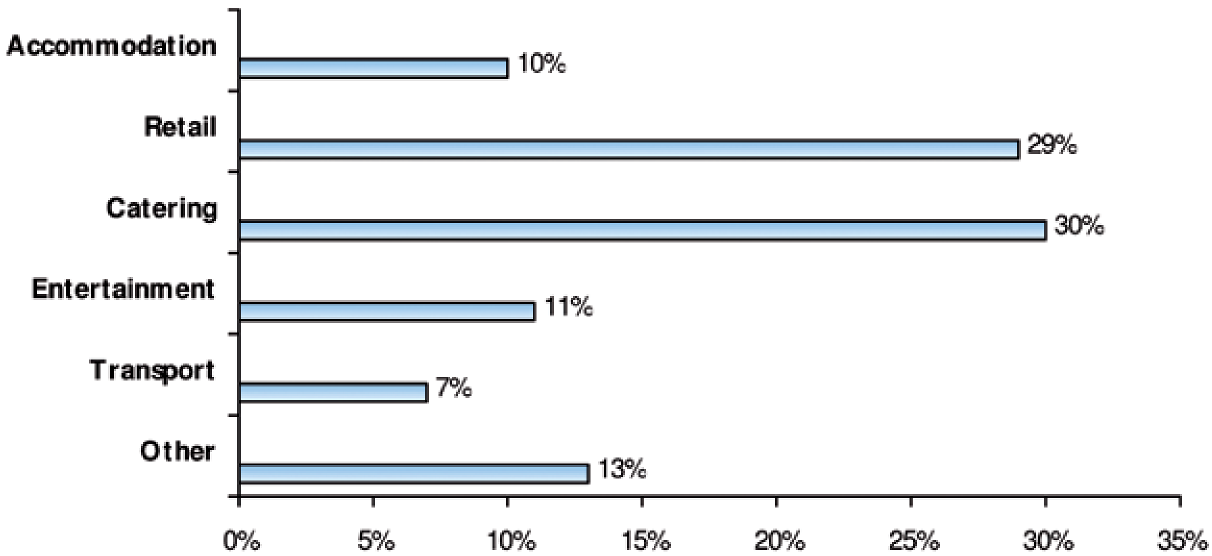
Other Influencing Factors

Trends in 'staycationing' and the continuing economic situation may help this to some degree and the VE trends appear to back this. Most affected and concerned by the recession are 35-54 year old C2DE families, and the older 55+ years unemployed. Least affected/ concerned are younger, 18-34 year olds without children, and older 55+ ABs[39], whose income may be protected. With this insight, there is some comfort in knowing that the key markets may be largely unaffected. The domestic competition is high – spa breaks, theme park packages with accommodation for family breaks, National Trust (membership has increased by 1.5million in the past 6 years), home entertainment, online gaming, and 'eating in' promotions by major brands including supermarkets, film streaming like Netflix etc as well "old" hobbies such as DIY are all competition for leisure time.

Over many years research nationally has concluded that women are traditionally the decision makers on days out/holidays, although the IGMT Vector research did not bear that out, likewise "pester power" did not figure highly. It is possible that IGMT is seen as a destination where there's much for men to do and enjoy, (and it was noted that shopping was not especially associated with the Museums, although this may be less good news for IGMT). It could be argued that RAF Museum Cosford and SVR also appeal to male markets and so, collectively, it might be that insufficient attention has been paid to this possible/additional dimension that would in no way negatively impact the female view of the day out/short break - especially in mixed family/ trans-generational groups where such factors might create harmonious visits.

Nevertheless in common with almost all visitor surveys in the UK, the greatest spend in the 2011 Telford EIA was on retail and catering.

Fig 38 Distribution of Visitor Spending



With the Arkenford research also highlighting the importance of food and drink as a factor in any visit as well as retail (of the more individual and independent type) it is crucial that hospitality and retail businesses across the TTP base recognise just how significant their services are to the visitor economy. Noticeable national trends in retail and home styling have seen a return to the 'retro', vintage, artisans, crafts, 'pop up' shops, a market towns vibe of Emma Bridgewater, Kirstie Allsop, Kath Kidson and there are local

[39] Trends in Leisure Tourism VE December 2013

opportunities to promote the Jackfield Fusion and Merrythought offer together with individual retailers and crafts in the market towns. The combination of the more “urban” style in Telford’s new “Convention Quarter” and the future refurbishment of the Shopping Centre would thus cater for all market segments identified.

At the moment the East Shropshire area lacks the kinds of “foodie” experiences that pertain in South Shropshire and Shrewsbury and even northern Shropshire. The business tourism sector and many of the businesses in general, including Wolverhampton and Harper Adams Universities in particular, would welcome such growth in and around the International Centre, notwithstanding that the Gorge currently acts as both the “cultural quarter” and the restaurant area for Telford, with Shifnal fast catching up.

There is still a lack of ‘boutique’ hotel accommodation although Ironbridge boasts a number of very highly rated B & Bs.

4.2 Existing and Growth Markets

Market research by external consultancies on overall markets, existing and potential, and by Ironbridge Gorge Museum Trust combined with insights from several other significant attractors to the wider area of East Shropshire reinforce the dominant profiles of certain market segments. Whilst the categorisation of these may differ in terminology it is clear that in leisure tourism the main markets are:

- Age 45+ couples
- Age 45+ couples with familes/extended families
- Younger Families with children (up to adolescence)

Using the ArkLeisure motivational segments, these demographic groups fall mostly into the (Value, Aspiration & Lifestyle modelling) of Cosmopolitans, Discoverers, Traditionals and Functionals, with some High Streets, possibly in the’ younger families’ segments.

As Ironbridge Gorge Museum is the major locomotive for the leisure visitor market[40] with well over half a million visits a year and the Gorge itself a wider attractor for walkers, general visits, cyclists etc (but to an unmeasured quantity), there is no doubt that growing these markets is a priority.

Both the Young Families segment and the Older Families with post-primary age children, are an excellent match with the Telford central offer and thus the opportunities for “packaging” are greater than ever. The greater percentage of visitors is day visitors, as is the case in most English domestic destinations, even coming as far afield for a day visit from London and the South East, but the majority are from the West Midlands Region with growth potential in the (nearer) South West Region and the North West.

Where possible, converting a percentage of these 3.3m day visitors into overnights through packaged product and incentives, increased PR and awareness-raising would have a very positive exponential impact on the area, but it must be recognised that there is still plenty of capacity to increase the day visit markets out of peak times, including the adult group market, which already has some overnight presence in some hotels and could grow further particularly as weekend occupancy rates needs boosting.

The much needed link from the M54 to the M6 northbound could have considerable impact on visitors from not only the North West but also the North Midlands. The new direct London train service, whilst the indicative timetabling looks unpromising for business users, offers opportunity for the leisure visitor particularly if packaged up with attractions and accommodation where feasible[41].

[40] and of course educational visits, with this survey does not cover but acknowledges as an influencing factor on family groups visiting the area
[41] The European Package Directive has hitherto been a barrier to packaged products but can be managed with relevant business support and was undertaken with the former Wrexham & Shropshire Rail Co

4.3 Destination Management Plan vision, priorities and actions

In summary therefore, the high-level vision for the Telford Tourism Partnership is:

- To combine the strengths of Telford and the Ironbridge Gorge's distinctive Leisure and Business tourism products into a powerful proposition, providing excellent customer care and growing repeat visits and recommendations.
- To continue to attract productive day markets and increase their value and volume wherever possible: whilst better targeting those longer staying, higher spending markets to the whole area, exploiting the unique and largely unspoilt heritage of the area as a compelling, quality visitor offer
- To reposition the awareness and perception of the 'Telford and Wrekin' area as a destination of choice for a good value short break or a business event: where visitors enjoy the best of town and country and benefit from seamless and 'easy to book' access
- To ensure that the people and town of Telford are full equipped to deliver a high quality "Conference Town" welcome, standards, skills and product excellence at all points of the delegate and visitor journey

This plan aims to deliver significant growth opportunities, higher returns per visitor, increased visitor satisfaction/visitor retention and recommendation.

The following are the KEY PRIORITIES with a detailed action plan in Section 5.

Priority 1:
Solving the identity crisis – positioning Telford as a credible destination for both leisure and business

Action:
Improve the Image and Perceptions of Telford and Wrekin

- Explore potential for renaming the Telford destination(s)
- Suite of shared images and key messages
- Increased and positive PR
- New photographic portfolio
- New DVD available online
- Positive testimonials, high ratings and increase visibility

Outcomes:

- Positive external media coverage generated
- Harnessing the power of the Ironbridge brand to the Town Centre product, convention town status and the softer rural and market towns offers
- Strengthened representation within other sector activities e.g. Inward Investment, Business Support
- Business growth and job creation
- Greater visibility and recognition within Council/ Cabinet, Chamber, business networks

Priority 2: Create an integrated marketing and PR plan

Action: Increase the power of promotion through joint resourcing and shared activity

- Shared key messages and imagery
- Avoid duplication of effort through joint planning and PR
- Integrated editorial coverage on and offline for greater impact
- Explore income generation opportunities e.g. new products, working with other well known Telford brands e.g. AGA to create joint resourcing and campaigns
- Support/market borough/market towns' marketing and events and support delivery of tourism action plans
- New opportunities for informal tourism information provision at gateways and key hubs
- Ensure cross-sell with business tourism opportunities where appropriate, especially "Unusual Venues" promotion

Action: Target priority markets and segments e.g. day/staying visitors, group travel

- Create offers/packages for target markets e.g. actives, traditionals, discoverers, cosmopolitans, foodies, with itineraries and incentives
- Develop online personalisation of destination key messages, products and offers
- Co-ordinate advertising and PR to target Bank Holidays and other seasonal/ calendar promotions, cultural events and festivals at destination level
- Include paid for with free experiences to extend dwell time/length of stay
- Promote on-line and off-line through better use of social media, shared databases
- Investigate joint campaigns and packages through 3rd party wholesalers

Outcomes:

- Increased awareness and perception of the destination
- Value for money from marketing and PR investment
- Increase in short stays and thus economic benefit by extending day markets and attracting new
- Support development and growth in the Market towns
- Ability to participate in Visit England promotional campaigns, exploit and justify Destination Management Forum membership

Barrel race up The Wrekin

Priority 3: Improve visitor experience through stronger people skills and knowledge

Action: raise management, creative, marketing, technical and people skills & exploit the fit with Marches LEP skills plan

- Identify sector requirements and prepare business support plan for EU potential funding
- Business skills training e.g yield, management, language skills, technical, creative, marketing etc
- Mystery shopper programme to benchmark experience
- Taxi training linked to licensing
- Customer service and product knowledge skills
- Exploit major events through tourism ambassadors and incentives

Action: Examine options and refocus activities and membership of TTP

- Promote through incentives, ambassadors
- Explore viability for incentivised Partner Card – visits to partner attractions
- Affiliation to quality marques

Outcomes:

- Improved satisfaction ratings (Trip Advisor)
- Confident, more knowledgeable staff with extended skills
- Increase in recommendations/WoM referrals
- Increased income across the sector
- Address market failure in sector specific areas and meet Global Host standards through Marches Skills plan

Priority 4: Improve visitor experience 'on the ground' through more efficient infrastructure & excellence in product development

Action: Improve overall visitor economy through better visitor services delivered via partnership

- Exploit and promote new product in the Ironbridge Gorge Museums (e.g. at Jackfield, Coalbrookdale galleries)
- Promote new Telford Centre hospitality product to family and other leisure markets
- Work with existing partnerships in market towns
- Operate a 'clash calendar' to maximise events in area e.g. carnivals, festivals – cross sell wider Shropshire festivals
- Avoid 'silent Sundays' through increased activities/events and more early evening economy
- Support street animation and activity e.g. street entertainers where appropriate
- Explore possible tourist car parking pass for all chargeable car parks across district
- Identify/create more bike hire opportunities at visitor venues
- Aggregate walking and cycling offers
- Increase River Severn access and usage including The Severn Way
- Promote and develop the Wrekin and Ercall as a destination for walking, wildlife discovery, geology etc working with Wellington, Shropshire Hills AONB, Shropshire Wildlife Trust, Wrekin Forest Partnership and Walkers Are Welcome (WaW)
- Extend wayfinding exercise and any new signposting needed in Borough beyond Telford Town Centre

- Instigate annual Operation Springclean: e.g. Clean existing and remove out of date information posts, remove overgrowth obscuring signs etc
- Floral schemes for festivals and events (joint purchase & hire out service)

Outcomes:

- Increasing length of stay/dwell time
- Support economies of market towns
- Recommendations on and offline and repeat visits

Top, left to right: SW1, Southwater; Wellington market; Newport

Priority 5: Transform Telford into a successful 'Conference Town'

Action: Develop the right conditions for Telford's recognition as a centre of excellence for the meetings and exhibitions industry

- Ensure 'buy in' to overall concept by all communities of interest, businesses and residents by a) providing key facts/business benefits information and b) facilitating access to employment and high quality training/product knowledge/taxi training etc
- Share and publicise in advance events programmes to maximise business support/ inward investment activity and PR
- Deliver new Ambassador Programme and major events bids partnership work
- Test potential for new products e.g. Delegate card
- Maximise potential of Southwater phased launches – e.g. new TTP membership activity/benefits, skills programmes, awareness campaigns with partner businesses and T & W PR dept
- Cross sell business with leisure through incentives
- Assist with quality of welcome and social programmes at major events and conferences
- Target Association markets and focus on Unusual Venue promotions
- Transfer business tourism desk to online conference enquiry website
- Continue to lobby for direct train service to London

Outcomes:

- Grow more and better business across the borough
- Increased skill levels in Town Centre businesses and in local population
- Higher business retention rates
- Increased positive perception of Telford

Priority 6: Create and resource a sustainable and robust research and intelligence plan that informs and monitors actions across leisure and business tourism

Action: Develop resources for consistent, regular and credible data and consumer research

This will underpin all future activity including wider marketing, inward investment, leisure and business tourism as well as business support and technological innovation. The LEP should be fully involved and contributing resources for this and as such some parts of this research programme may be better undertaken on a Telford and Shropshire base.

Top, left to right: Hot air ballooning over the Shropshire Hills; the Ironbridge Suite, The International Centre; Ironbridge Power Station; RAF Museum Cosford

5 Action Plan

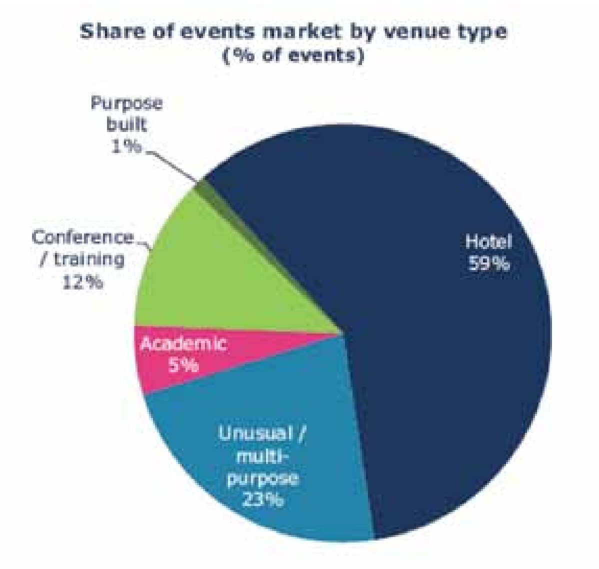
See separate document.

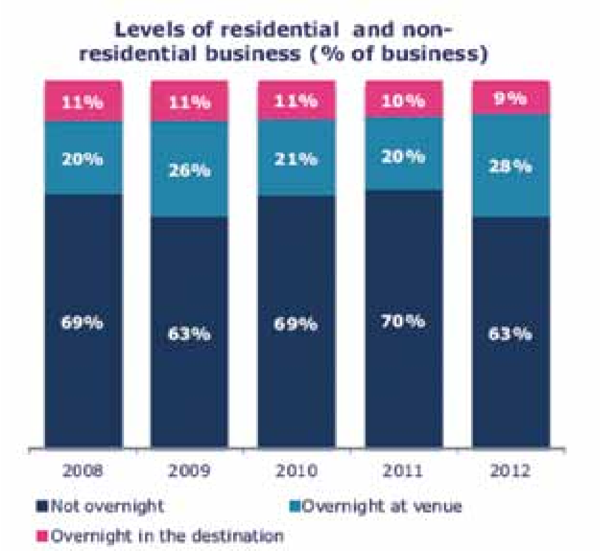
6 Appendices

Appendix 1: National Business Tourism Context

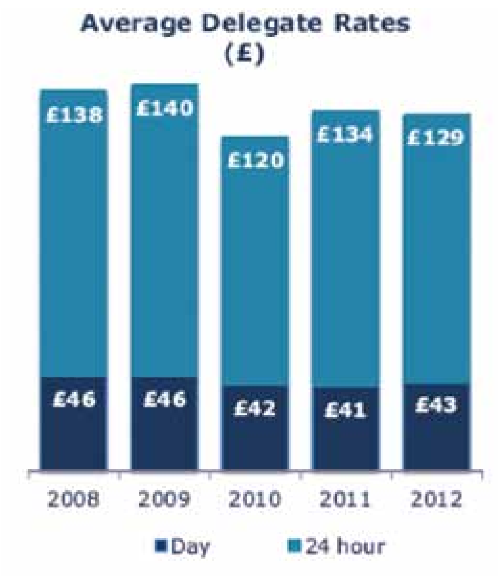
Source: UK Event Market Trends Survey (UKEMTS) and UK Economic Impact of the UK Meeting & Events Industry (UKEIS)

Dimensions of the Events Market



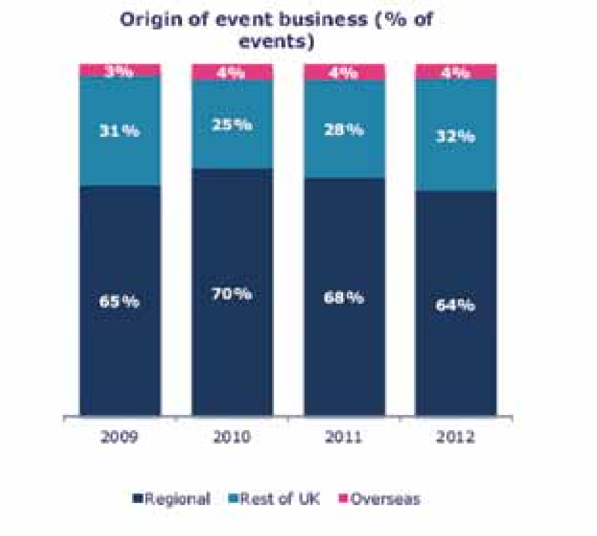


Levels of residential and non-residential business (% of business)
11%
11%
11%
10%
9%
20%
26%
21%
20%
28%
69%
63%
69%
70%
63%
2008
2009
2010
2011
2012
Not overnight
Overnight at venue
Overnight in the destination



Average Delegate Rates (£)
£138
£140
£120
£134
£129
£46
£46
£42
£41
£43
2008
2009
2010
2011
2012
Day
24 hour

Type of event organisation (% of events)
36%
37%
28%
23%
23%
17%
16%
21%
20%
21%
47%
47%
51%
57%
56%
2008
2009
2010
2011
2012
Corporate
Association
Public / govt.



ENGLAND BY REGION	MEETINGS	PER CENT IN ENGLAND
Greater London	362,500	32.4
East	78,318	7.0
South East	163,349	14.6
South West	74,961	6.7
East Midlands	55,941	5.0
West Midlands	143,210	12.8
Yorkshire and the Humber	89,506	8.0
North East	30,208	2.7
North West	120,833	10.8
TOTAL	1,118,827	100

CITY	MEETINGS	PER CENT OF HOME COUNTRY
London	362,500	32.4
Cardiff	47,376	62.5
Edinburgh	28,553	33
Belfast	14,436	70.6
Liverpool	19,020	1.7

Figure 7. Proportion of Total Meetings by Host Organisation

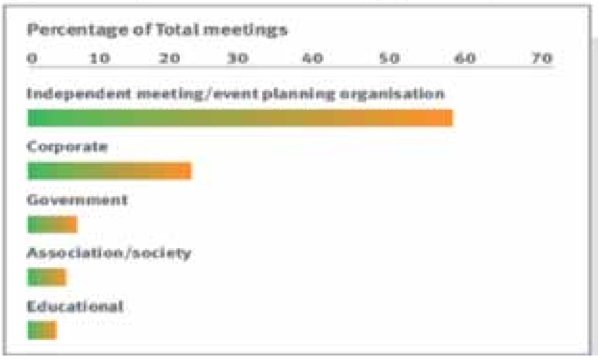


Figure 9. Proportion of Total Attendance by Meeting Type

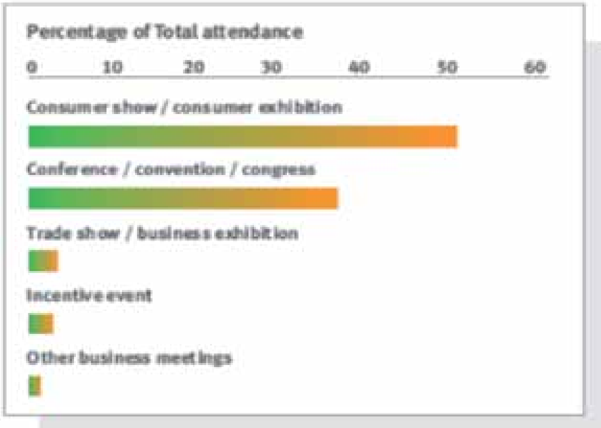


Table 11. Meeting Organiser Spend by Meeting Type

MEETING TYPE	TOTAL SPEND (£, MILLION)	%
Conference/convention/congress	10,610	43%
Consumer show/exhibition	2,289	9%
Trade show/business exhibition	3,299	13%
Incentive event	2,412	10%
Other business meetings	4,431	18%
Other meeting type	1,575	6%
TOTAL	24,616	100%

7 List of reference documents

Available on the Telford Tourism Partnership Website www.telfordpartnership.co.uk

1. Trip Advisor Ranking
2. 2003/4 Ironbridge Gorge WHS Management Plan
3. Deloittes EIA of UK Tourism 2013
4. KPMG/HLF/VB UK Heritage Tourism EIA 2009 (updated 2013)
6. VE Domestic Leisure Tourism Trends for the Next Decade (Dec 2013)
7. 2009 Arkenford Research
8. Shropshire Leisure markets & Motivations Updated 2008 (TEAM)
9. 2011/12 Arkenford Marches
10. 2007/08 Visitor Survey (The Research Solution)
11. IGMT Research
12. Telford Hotel Futures 2014

Leek
Matlock
Crewe
Nantwich
Wrexham
Stoke-on-Trent
Ashbourne
Ruabon
Newcastle-under-Lyme
Whitchurch
Llangollen
Derby
Uttoxeter
Ellesmere
Stone
Market Drayton
Oswestry
Wem
M6
Stafford
Burton upon Trent
Newport
Ashby-de-la-Zouch
Shrewsbury
M6
Cannock
Telford
Welshpool
M54
M6 Toll
Tamworth
M42
Brownhills
Wolverhampton
M6
Walsall
Montgomery
Church Stretton
Bridgnorth
M6
Nuneaton
Dudley
Bishop's Castle
Birmingham
Birmingham
Stourbridge
M5
Coventry
Kidderminster
M42
Ludlow
Knighton
Stourport-on-Severn
M42
Bromsgrove
M40
Leamington Spa
Redditch
Warwick
To Market Drayton
and Hawkstone Park
Newport
Wellington
To Weston Park
Telford
The Wrekin
Madeley
Ironbridge Gorge
Much
Wenlock
To Bridgnorth and
Severn Valley Railway


To Market Drayton and Hawkstone Park
Hoo Farm
To Newport, Harper Adams University and National Sports Centre
Hortonwood Industrial Estate
Donnington
Wellington
Jungleland
Hadley
Sunnycroft (NT)
The Place
Oakengates
To Weston Park
Telford
University of Wolverhampton (Telford Campus)
Stafford Park Industrial Estate
Telford Shopping Centre
Telford Ice Rink
Southwater
The International Centre
The Wrekin
Dawley
Telford Town Park
Stirchley
Brookside
Lightmoor
Halesfield Industrial Estate
Darby Houses
Coalbrookdale Museum of Iron & Enginuity
Woodside
Madeley
Ironbridge Gorge
World Heritage Site
Museum of The Gorge
The Iron Bridge & Toll House
Blists Hill Victorian Town
Jackfield Tile Museum & Fusion
Coalport China Museum & Tar Tunnel
To Bridgnorth and Severn Valley Railway
Broseley


internationalcentre

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