Staffordshire's

VISITOR ECONOMY ACTION PLAN

2022–2025

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FOREWORD

The Plan to develop Staffordshire's visitor economy from 2022-25 is fully endorsed and championed by Staffordshire's Destination Management Partnership Board. And the Board is committed to making a significant contribution to its delivery. Ambitious yet realistic, the Plan has been created using the in-depth knowledge and on-the-ground insights of stakeholders who passionately believe in the significant role the visitor economy has to play in stimulating future economic growth. Together, we are confident that it's one of Staffordshire's most viable ways to increase Gross Value-Added economic output and community wellbeing.

Setting targets for growth and providing a clear rationale for investment, the Plan is intended to influence the activities and investment decisions of all those with a stake in the visitor economy, including public authorities, businesses, service providers, education establishments, cultural organisations, and landscape management partnerships.

Across Staffordshire the visitor economy has enormous potential. Pre-pandemic it was worth 1.87bn[1] to the local economy and supported 33,000 jobs. Over 80% of those leaving education are employed in it, and it acts as a springboard of influence for future career paths. And it connects to local agendas including planning, transport, public health, culture and events, digital services, local pride, and sustainability, providing an arena in which they can come together for the benefit of local communities and visitors alike.

And yet there are a myriad of opportunities for the sector to add even more value, building on strong foundations which include our world-renowned brands, iconic visitor attractions and excellent transport connections. The county is recovering quickly and has recently played host to Commonwealth Games activities and supported the Queen's Platinum Jubilee, demonstrating both its potential and ambition to act at the regional level and on the national stage.

At the height of the Covid 19 Pandemic, it became clear that there was the need for a more concerted effort to be taken to overcome the severe challenges facing the sector. With open conversation, a commitment was made by the public and private sectors to pull together at county and district levels to share best practice and resources to support each other. The Destination Management Partnership (DMP) Board was reborn. As the pandemic recedes, the Board is building on promising foundations, forged at a time of need but committed to strengthening the partnership further. The group is committed to become more inclusive and an effective champion for the visitor economy as a whole.

A successful visitor economy can sustain business, safeguard jobs, and positively impact the lives of local residents and communities through opportunities for employment and enjoyment. It can help produce a place that offers those who live, work, and study here a healthier work-life balance and unrivalled quality of life.

[1] *Source: The Economic Impact of Tourism – Staffordshire 2020*

Our Destination Mangement Partnership is committed to celebrating what makes Staffordshire special from our creative heritage to our diverse and vibrant communities that will provide the warmest of welcomes to visitors, students, investors and those who are proud to call the county their home.

Cllr Philip White, *Cabinet Member for Economy and Skills, Staffordshire County Council and Chair of the Destination Management Partnership Board for Staffordshire*

Thor's Cave

INTRODUCTION

Staffordshire has a visitor economy that performs well in some areas but has unrealised potential. It's growing at around 3% per year and in 2019, pre-pandemic, reached a value of £1.87bn. Its value is ahead of some neighbouring destinations, such as Shropshire, but behind others, like Cheshire. And it falls slightly behind the projected national growth rate to 2025 of 3.8% annually[2].

Its success is based on strong attractions that draw visitors principally from regional population centres well-connected to Staffordshire by road and rail. This is boosted further by business visitors from across the West and East Midlands choosing Staffordshire and Stoke-on-Trent as a place to meet. In addition, a significant student cohort studying at Keele and Staffordshire Universities are helping to drive the visiting friends-and-relations market (VFR)[3], which is also increasing against recent population data captured in the 2021 Census results for the county. The VFR market - as expected due to the pandemic – is currently the fastest growth domestic visitor market in the UK, although other markets are anticipated to recover by 2025.

While there is a general appreciation of the sector both as a driver of income and employment, and for its contribution to quality of life for local communities, there is a consensus among stakeholders that the area is not yet reaching its full potential. Staffordshire-wide interventions are not always conceived and implemented to the maximum, to drive productivity, visits, and value. This is to some extent because of a lack of robust data and intelligence to inform strategy and planning. But, of course, there are exceptions across the county that demonstrate a stronger appreciation, and the DMP will work to continue to support these as well as to bridge the gaps.

Elsewhere, individuals and organisations are working undeniably hard in the sector, but time, effort and money has tended to be directed towards specific and tactical local, or organisational priorities, rather than as part of a strategic approach to development and promotion. The result is less overall success, slower-than-average growth, and the fragmentation of product and offer.

Staffordshire County Council's visitor economy team has recognised the challenge and – building on the recommendations of the Destination Management Partnership Board – has commissioned the development of a visitor economy action plan (VEAP). This looks to identify the objectives that the Destination Management Partnership are best tackling collaboratively, for reasons of effectiveness and impact.

The VEAP is intended to add value to existing activity and highlight where collaboration can reap greater rewards.

The VEAP has been informed by a review of over 50 distinct plans and strategies that relate directly to Staffordshire's visitor economy, and indirectly in plans relating to culture, communities, place, skills, towns and landscapes. Our intention is to understand forward plans as fully as possible and avoid duplicating or undermining work that is already agreed and underway.

[2] www.visitbritain.org/visitor-economy-facts
[3] The 2021 Census results for Staffordshire show that population is growing

Drayton Manor Resort

World of Wedgwood

The stated aims and objectives of the Staffordshire Strategy and Action Plans remain relevant, in particular the need to work more effectively and collaboratively to make marketing more effective, produce market intelligence, enhance the product, and improve the visitor experience.

At a more recent, county-level, plans that address specific destinations, landscapes, geographies and towns were also reviewed, and a selection of research reports from Visit England's research report repository were considered. These relate to Staffordshire's product offering and visitor profile, and annual benchmarking reports that relate either to Staffordshire or the West Midlands region. Also considered were consumer and industry trends reports from national and international publishers.

The VEAP is underpinned by a comprehensive product audit conducted by Staffordshire County Council with support from Keele University, and an exercise to map stakeholders with a direct or tangible interest in the sector. The product audit will be developed and refined over time as we undertake additional research for the sector.

The VEAP has been prepared with input from Staffordshire's main destination organisations and regional partners, and has been tested with the public and private sectors from across Staffordshire and Stoke-on-Trent in two workshops and a series of 1-2-1 interviews. In addition, two day-long workshops attended by a good mix of private and public sector stakeholders focused on destination strengths, and began the job of packaging the area into a series of itineraries for promotion and distribution.

This work was undertaken between February and July 2022.

Trentham Monkey Forest

Alton Towers Resort

Moat House Hotel

REVIEW FINDINGS

There is a general recognition of – and agreement on – Staffordshire's strengths at all levels of thinking and planning

- Destinations with regional or national visitor appeal and reach include: The National Forest, The Peak District, Alton Towers, the National Memorial Arboretum, The Potteries, Drayton Manor, Cannock Chase, Trentham Estate, and selected market towns and cities, particularly Lichfield and Leek
- Strong consumer brands such as Wedgwood, Emma Bridgewater, and Alton Towers
- The advantages of very good road and rail connections to major population centres including the West Midlands conurbation and Greater Manchester, which are both important source visitor markets. We also enjoy proximity to four international airports, in particular Birmingham Airport which has direct rail connections from Stafford and Stoke-on-Trent
- The quality of the natural environment and special landscapes, principally Cannock Chase Area of Outstanding Natural Beauty (AONB) and the Peak District National Park
- Strong heritage assets especially in the cities of Lichfield and Stoke-on-Trent
- The potential of market towns like Leek, to attract visitors, as well as Burton on Trent (brewing), Stone (food), and Tamworth (adventure).

Where strategies and plans identify opportunities for improvements, they generally agree a focus on:

- Further roll-out of digital connectivity across the whole county
- The need for more accommodation choices
- More joined up and grounded business and skills/employment support
- Improved internal public transport connectivity.

Lichfield Cathedral

Stone Food Festival

The National Memorial Arboretum

Areas with the strongest reputation and product offer are most likely to have their own dedicated visitor economy plans (Destination Management Plans). Elsewhere, visitor economy is frequently mentioned in town, district, and landscape management plans and these are most likely to focus on:

- brand development, creating a distinctive identity and image for the locality but not for Staffordshire as a whole
- increasing awareness of the locality through marketing
- increasing accommodation stock
- sustainable development, although this is rarely clearly defined or translated into specific actions
- development of an accessible and inclusive product, not just for visitors, but for residents too.

The literature review and 1-2-1 consultations have highlighted challenges too.

1. **Differences in approach to the visitor economy in each area of the county, and different levels of regional support**

Staffordshire's visitor economy is covered by three Local Enterprise Partnerships (LEPs),[4] and tourism is mentioned in all three LEP strategies. It has the highest priority, and is dealt with in the most detail, in the D2N2 LEP strategy which features a small amount of the Staffordshire Moorlands in the Peak District National Park. Here, the visitor economy is one of eight priority sectors. It highlights investment around attractions, cycling, and natural and heritage assets, and also supports initiatives including a business growth fund, sector skills action plans, and support for market towns and rural areas.

Lichfield district receives support from the West Midlands Growth Company, though there is uncertainty around geography and remit, and the level of intervention that will be welcomed on the ground. There is also an opportunity to develop a wider-reaching partnership in the future.

Informal partnerships exist with neighbouring Destination Management Organisations, where it makes strategic and commercial sense. Marketing Cheshire and Marketing Peak District and Derbyshire in particular have Staffordshire-based businesses paying into their memberships.

2. **Visitor economy is dealt with in general rather than specific terms**

It's name-checked in many county-level strategy and policy documents, and sub county plans,[5] and it's generally assumed that the sector will benefit from broad brush interventions being applied to all sectors.

The visitor economy is prominent in Staffordshire's Place brand where it is celebrated through lobbying and Ambassador activity. But there are a few exceptions. Staffordshire's emerging digital strategy goes as far as describing how tourism could benefit from its objectives, specifically interactive attractions and an enhanced visitor experience.

While some areas of the county have, or are, considering visitor economy plans specific to their location, there has been no dedicated county-level plan since the Destination Staffordshire Strategy and Action Plan of 2015-18. Beacause of this, the sector lacks a clear and cohesive understanding of what it should be looking to achieve in the medium and longer term, as well as what it needs to do to evolve and grow.

3. **Staffordshire's positioning as a visitor destination needs to be better articulated**

Work on the 'We are Staffordshire' Place branding is starting to address the gap and – building on Place branding principles – it's recently been proposed that Staffordshire is *Britain's biggest and best playground.*

In earlier plans, 'Staffordshire has badged itself the Creative County' but this idea is not well developed into a sense of what differentiates Staffordshire, in visitor economy terms, from other English counties. While there is consensus on Staffordshire's strong brands and destinations, they are not used frequently or effectively enough to make an impact.

A strategic approach to positioning and marketing that draws together Staffordshire's assets and attributes would show why people should consider a visit, and in turn support tactical marketing activity and help the county shape an identity and grow its profile.

4. **Promotion of Staffordshire would benefit from a more joined-up and coordinated approach**

There are a plethora of websites, social media accounts, and guides produced and managed by the public sector that aim to promote Staffordshire to the consumer. They generally tend to focus on one part of the county though and there is little evidence of coordination around shared themes, brands or products.

The exception is Enjoy Staffordshire which covers the whole county as well as the city of Stoke-on-Trent, and Visit Stoke which focuses on the city and takes in Newcastle-under-Lyme and some selected attractions and towns in surrounding areas of the county such as Biddulph Grange Garden, Alton Towers Resort, and Cheadle. Visit Lichfield is also inclusive of other assets that sit slightly further afield to their patch.

A small amount of content coordination could make all these promotional platforms and channels mutually supportive, and more effective at increasing visibility in a crowded marketplace. If some coordination could extend to private sector promotion too, the impact could be even greater.

5. **Staffordshire needs to agree its target visitor segments.**

The types of visitors that Staffordshire might appeal to, and so should target, are currently not clearly identified or described within existing

[4] *Stoke-on-Trent and Staffordshire, Greater Birmingham and Solihull and D2N2.*

[5] *The most relevant are: The Economic Impact of Tourism – Staffordshire 2020, Enjoy Staffordshire – Visitor Segmentation 2017, Staffordshire Sustainable Community Strategy 2008-2023, Staffordshire Hotel & Visitor Accommodation Development Strategy 2019, Staffordshire Rural Economic Strategy 2022-2030, Cannock Chase AONB Management Plan 2019-24, Draft Staffordshire Economic Strategy 2022-2030*

strategies. In the past they have been, and that lack of clarity can cause confusion.

The 2015-18 Destination Strategy and Action Plan, the Enjoy Staffordshire 2014-15 Marketing Plan and the 2013 TEAM Visitor Segmentation Strategy identified short break takers as the priority segment and sorted them into three main types: those interested in active leisure (empty nesters and newly retired), thrills (families with children under 16), and culture and relaxation (couples pre-family or without children).

In recent years, VisitEngland has brought forward a national segmentation model onto which earlier Staffordshire segments can be mapped. Following the national lead makes sense because it ensures Staffordshire can benefit from nationally-funded and led marketing campaigns.

However, consumer behaviour and trends must be carefully monitored. The pandemic has changed tastes, preferences, and confidence-levels, and these are all continuing to shift, so targeting, marketing, and messaging needs assessing and refreshing on a regular basis.

6. More could be made of famous people, past and present, that are connected to Staffordshire

Many have the potential to highlight and communicate positive Staffordshire attributes, and have a strong story to tell. Take design and innovation excellence, (Clarice Cliff, Emma Bridgewater, Josiah Wedgwood), and great thinkers and writers (Dr Johnson, Erasmus Darwin, JRR Tolkien, Arnold Bennett, and Shane Meadows), or great entertainment, (Philip Astley, Robbie Williams, or Stanley Matthews).

The *We are Staffordshire* Place branding has started to tell the Staffordshire Story and this should be built on further.

7. Local Plans should better support the fundamental principles needed to build a successful visitor economy

Though they were considered within the Destination Staffordshire Strategy and Action Plan 2015-18, they don't appear to have percolated through to recent local thinking. Several of the issues are addressed in this plan, where they would be best tackled across district and county borders, and by both the public and private sectors in collaboration. The core issues that are missing at a local level that would benefit from intervention through collaboration are:

- **Business support** – how providers of business support can effectively back visitor economy businesses, particularly post-Covid
- **Business tourism** – up-to-date information on its relevance, importance and potential is needed, though new facilities are being considered in Stoke-on-Trent and Stafford.
- **Inclusivity and connectivity** – in terms of both digital and travel and transport
- **Networks and business infrastructure** – how the county collaborates internally and with external partners, and how the tourism industry comes together to share information and best practice, and champion the area
- **Quality** – enhancing the local and visitor product and place
- **Seasonality** – there's no clear evidence that seasonality is a major issue, although given the rural nature of Staffordshire there may be localised examples
- **Skills** – how critical shortages in the hospitality and wider visitor economy workforce are being addressed. This includes the role of higher and further education in influencing provision, and the training and growth of the workforce of the future
- **Target markets and target visitor segments** – existing or future

Waterworld, Stoke-on-Trent

Snowdome

8. Partnerships need to be strengthened to achieve more for Staffordshire.

Staffordshire is, like many places, a complex and multifaceted destination, with a diverse and large geography that is not easily coordinated. It has, for several years, become a set of destinations and brands working mainly in isolation from each other, and there has been a lack of effective partnership-working. There is an opportunity to forge more, both in the sector and between sectors at both local and county level.

9. Internal fragmentation translates to reduced opportunities for partnerships regionally and nationally.

One of the consequences is lost opportunities to secure larger-scale investment and support, and to act on the national stage. It also means that time, effort and money spent does not have as much impact as it could – or should – do.

CONCLUSIONS

Many of the challenges articulated in the Destination Staffordshire Strategy and Action Plan 2015-18 remain relevant in 2022 and beyond.

The Covid-19 pandemic has inevitably played a large part in interrupting progress that was underway, however, it's not apparent that the county was moving forward as hoped despite having a clear plan.

As a result, many of the recommendations in the earlier plan have been revisited here, and restated or reconfigured. We have considered almost three years of pandemic-related challenges, including reduced funding, changing visitor behaviours, squeezed capacity, and increased fragmentation.

The key difference for the 2022 VEAP is that it does not try to tackle all the issues that the visitor economy faces – particularly where they are being addressed at a local level. Instead, it focuses on what is best done collectively across Staffordshire. It is practical and pragmatic, and recognises that added value is key to a functioning and successful partnership.

Peak Wildlife Park

The VEAP builds on the guidance and intelligence already out there (the literature review, product audit, workshops, and interviews undertaken in the first half of 2022) and recommends a tightly-focused set of high-level actions to address some of the key challenges facing Staffordshire's visitor economy.

It looks ahead and describes how we will use our collective resources to lay strong foundations. It focuses on actions where there are real and tangible benefits. It looks to partnership working that will yield long-term benefits. Where activity is best decided and delivered at a district, borough, town or destination level, or where activity responds to the needs of a specific locality, it is welcomed and supported.

It's recognised that in some areas, such as workforce development, additional or different activity may take priority to meet short term or underlying challenges. Take the staffing crisis in hospitality as an example. And so the timescale for delivering activity may evolve, where resources are scarce or diverted.

The VEAP has a three-year timeframe and is realistic and pragmatic about what can be achieved. But it will need reviewing and updating to take account of changes and trends at the macro and micro levels.

For the purposes of this plan, the term visitor economy follows the definition published by the ONS based on the ETRIP (English Tourism Research and Intelligence Partnership) report on tourism terms and definitions in 2011:

The arena for staying and non-staying visitors, together with the activities of public and private sector bodies that are directly or indirectly involved in supplying the goods and services for visitors, as well as the upkeep and development of the public realm, including the infrastructure within which, and through which, visitor activities take place.

AIMS AND APPROACH

1. **Make a strong contribution to economic growth and prosperity.** We will support businesses, improve the product, and increase the impact of marketing
2. **Make a strong contribution to achieving net zero by 2050.** We will keep the needs of the environment, communities, businesses and visitors in balance
3. **Improve quality of life for Staffordshire's communities.** We will provide more opportunities for employment and enjoyment. We will embrace and celebrate our diversity and welcome different cultures and communities to enjoy Staffordshire.

OBJECTIVES

Our hard objectives are:

A visitor economy with a value of £1.87bn by 2025 (Building back to pre-pandemic levels)

Develop a stretch target for growth of Staffordshire's Visitor Economy based on renewed insight data.

Progress towards these objectives will be measured through regular economic impact assessments, and will be sense-checked in the first actions of this plan to take account of potential changes in reporting methodology. We will ensure that these targets are realistic yet ambitious against inflation and economic challenges that impact the Visitor Economy.

A commitment to sustainability remains at the heart of all we are doing with this VEAP – both in the sense of our impact on our environments, and the need to ensure longevity in our plans.

We are committed to sharing best practice across destinations, venues, and localities, and we are also eager to encourage collaboration to reduce waste, install the principles of a circular economy, and minimise, mitigate and manage the environmental impact of visitors.

We are also focused on encouraging inclusion, and will actively seek ways to ensure that our collaboration opens doors to those groups of people who may otherwise struggle to access our destinations. Alongside the sharing of best practice across venues and localities, we are committed to proactively considering any ways in which we can improve accessibility. We are also, as a Board, proactively seeking ways to increase our own diversity, and to reach out to under-represented sections of our community.

OUTCOMES

The success of this plan will be evaluated against a set of outcomes. One of the early tasks of the visitor economy partnership is to establish a baseline, or target, for each of the outcomes and an agreed way of measuring progress.

Actions in this plan will help provide baselines from which targets can be agreed. The partnership should aim to establish a full set of targets within 12 months of adopting the plan.

The outcomes that are sought are:

- **More investment from regional partners, investors and national government**
- **More support for the sector locally, regionally and nationally**
- **Recovery and growth across all key sectors and business types including SMEs and micro businesses**
- **Marketing that is more targeted and has greater impact, to encourage those visitor markets with the greatest propensity to choose Staffordshire**
- **Businesses that are more resilient, profitable, and sustainable**
- **A strong and inclusive partnership to champion and lead Staffordshire's visitor economy**
- **A higher proportion of visitors that stay overnight**
- **An improved visitor experience and perception of Staffordshire.**

OUR VISION

Each area of our wonderful county has its own core vision, but they all share common threads. A desire to create an environment of growth, with localities that are thriving and succeeding. One where businesses and people are supported to be their best. Where residents, workers, students, and visitors are welcomed and enjoy their time. And where investment is rewarded. And they ultimately want to do all of this in a way which is sustainable – for our environment, for our people, and for future generations.

We recognise that we can help achieve all of this and more by enhancing the contribution of the visitor economy. Indeed, the visitor economy provides one of the most significant growth opportunities for our region over the years to come. This growth will feed back into all our communities, capturing greater value, supporting our businesses, and sustaining and providing jobs. And this will all provide more to do and see in the region for residents and locals, as well as their visiting friends and relatives.

Through our partnership, our Vision is that:

We'll create a joined-up experience and offer which draws visitors from near and far – encouraging them to stay longer, play, pause and experience more; returning time and again to relive and remake cherished memories.

ACTIONS

ACTIONS ARE ORGANISED UNDER SEVEN THEMES:

1. **Partnership development**
2. **Product development**
3. **Marketing**
4. **Inclusivity and Connectivity**
5. **Skills and Training**
6. **Business Support**
7. **Sustainability**

We've included estimated timescales for the completion of each theme. Short term means within 9 months of being adopted, medium term within 18 months and long term within 36 months. Each action has a set of desired outcomes.

Organisations or individuals that could, or should, lead haven't yet been identified. The allocation of actions will be an early task of the visitor economy board.

1 PARTNERSHIP DEVELOPMENT

The underlying theme of this plan is that, in many instances, the whole is greater than the sum of its parts. We believe that a partnership approach can bring significantly greater benefits than acting alone. We now have more resource in-place at a county level to support collaboration, as well as renewed support at a political level across Staffordshire. Add to this a renewed focus on the visitor economy post-pandemic and there's certainly an opportunity to bring more coherence to the way that Staffordshire approaches visitor economy development and promotion.

Indeed, the potential benefit from new ways of working at the national level, should the recommendations of the De Bois review be implemented, will be far easier to leverage if partnerships in-destination are strengthened now.

The main reasons for recommending a stronger partnership approach both within Staffordshire and with regional partners and related sectors include:

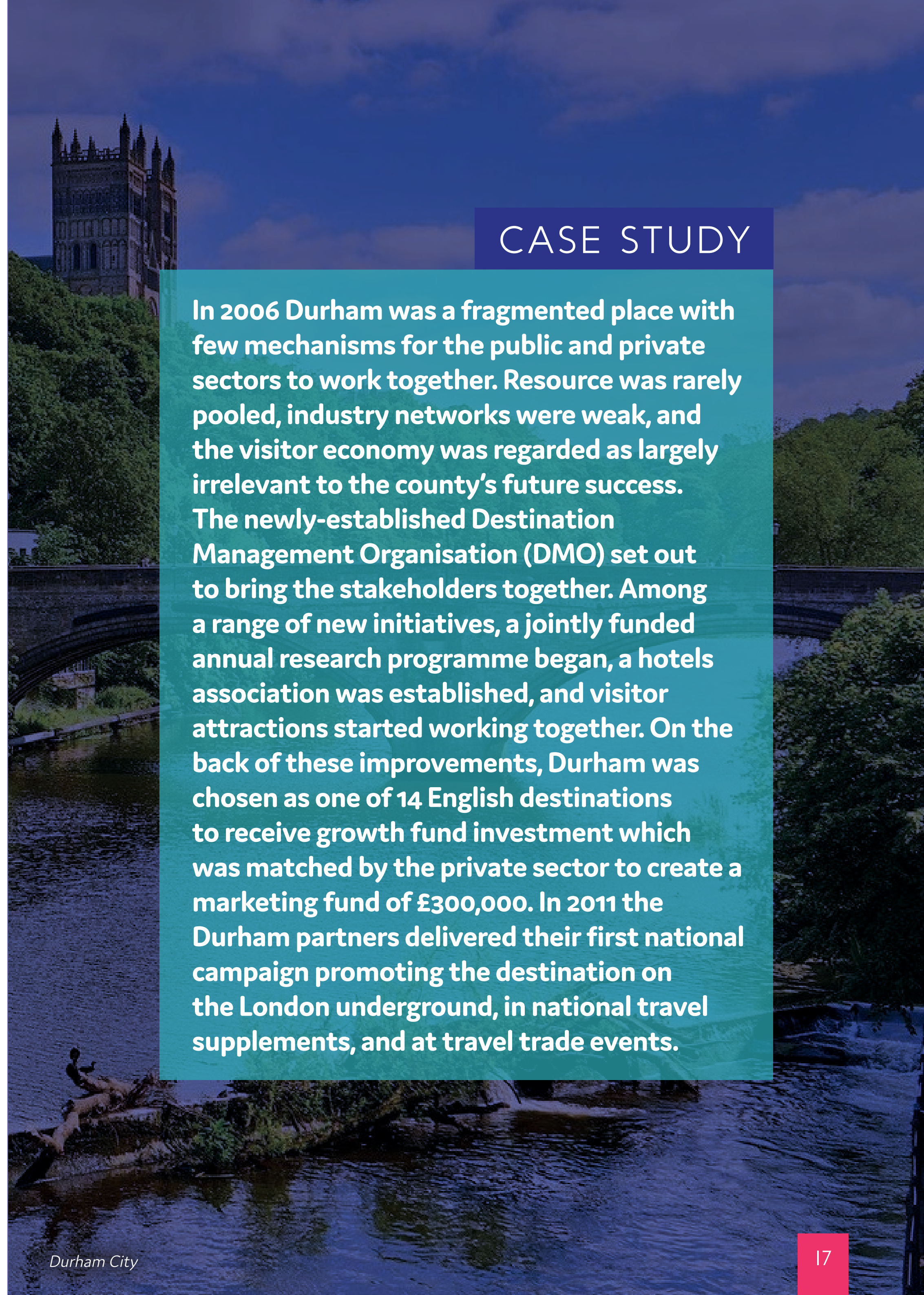
Funding – As money becomes ever-more tightly constrained, nationally and locally, and the private sector strives to recover from the challenges of the pandemic, everyone in Staffordshire will need to consider how and for what purpose financial resources should be pooled.

Potential for increased investment – Partnership working across county and regional boundaries is becoming a fundamental requirement to leveraging national funds into destinations and regions. Funds such as the £40m Discover *England Product Development Fund* is one example where collaboration was a prerequisite for a successful bid. (Staffordshire sadly benefited little from that fund at the time). Partnerships are almost certain to be the beneficiaries of future funding opportunities.

Covid recovery and post-pandemic opportunity – With the whole country struggling to bounce back from the effects of the pandemic, a fragmented and uncoordinated set of destinations will undoubtedly find it more challenging to recover than an area that works collaboratively. As a result of Covid and its aftermath, international uncertainty, inflation, constrained air capacity, and the cost-of-living crisis, more consumers are willing to consider domestic breaks, and many are actively seeking less crowded areas and new experiences. One of Staffordshire's advantages is the sheer volume and variety of contrasting experiences available within a compact, and (importantly) easily-accessible geography (West Coast Main Line, M6, A50). This sets us apart from other predominantly rural destinations, and these advantages are far more likely to be realised when we work together as an area.

Untapped potential – Realising our potential and our ambitions for our visitor economy requires a firm commitment to achieving more, and this means exploring cross-fertilisation of opportunities and collaboration.

Local benefit – The visitor economy has the ability to benefit a very wide range of people and businesses, not just those that operate in honeypot locations, or who service visitors directly. The visitor £ is spent across multiple sectors and multiple business types. Indeed hospitality, retail, and public infrastructure such as car parking all benefit from visitor spend. A thriving visitor economy also supports the concept of local pride and creates employment opportunities and career paths for resident populations, as well as supporting a wider range of leisure and cultural opportunities for local people to enjoy. Ensuring that visitor spend benefits as wide an area as possible is best achieved through a partnership approach.



CASE STUDY

In 2006 Durham was a fragmented place with few mechanisms for the public and private sectors to work together. Resource was rarely pooled, industry networks were weak, and the visitor economy was regarded as largely irrelevant to the county's future success. The newly-established Destination Management Organisation (DMO) set out to bring the stakeholders together. Among a range of new initiatives, a jointly funded annual research programme began, a hotels association was established, and visitor attractions started working together. On the back of these improvements, Durham was chosen as one of 14 English destinations to receive growth fund investment which was matched by the private sector to create a marketing fund of £300,000. In 2011 the Durham partners delivered their first national campaign promoting the destination on the London underground, in national travel supplements, and at travel trade events.

Durham City

PARTNERSHIP DEVELOPMENT

ACTIONS		OUTCOME
Review the make-up of the visitor economy partnership and identify gaps in sector and geographic representation such as hospitality, food and drink, activities, and accommodation	WITHIN 9 MONTHS	A STRONG AND INCLUSIVE PARTNERSHIP
Decide how the partnership will discuss, debate and work collaboratively, including who meets, when, and how often for greatest effect	WITHIN 9 MONTHS	
Identify existing sector, special interest, and geography-based networks and attach them to the partnership	WITHIN 9 MONTHS	
Establish working groups for : • sustainability • accommodation development • data and market intelligence	APPROX 9-18 MONTHS	
Fill gaps in sector networks such as a hotels association, and visitor attractions forum	APPROX 9-18 MONTHS	
Identify opportunities to work with sectors most important to the visitor economy, specifically culture, leisure, transport, and heritage, and establish ways of working	ONGOING	MORE INVESTMENT MORE SUPPORT FOR THE SECTOR
Collate existing data on key destination performance measures such as occupancy, spend, visitor experience, value, and visits, and turn it into market intelligence	ONGOING	
Fill data and intelligence gaps with appropriate activity such as economic impact assessments, visitor surveys, and a STEAM subscription	ONGOING	
Create a strong partnership with The West Midlands Growth Company building on the Commonwealth Games legacy, business support and training	ONGOING	INCREASED MARKETING IMPACT IMPROVED VISITOR EXPERIENCE MORE STAYING VISITORS
Create strong partnerships with Visit Peak District and Derbyshire and Marketing Cheshire for product development and marketing purposes focused on the Peak District National Park	ONGOING	
Create a strong partnership with the National Forest for product development and cross border marketing purposes.	ONGOING	

2 PRODUCT DEVELOPMENT

For Staffordshire, product development means developing a broader range of facilities and services to support its strongest destinations and attractions, as well as better packaging of existing product, and building an accommodation base that can support more overnight stays.

A new product audit has listed several thousand businesses that come under the definition of the visitor economy[6]. Within the mix there are a handful of national exemplars specific to the area including the National Memorial Arboretum, the ceramic centres of excellence clustered around Stoke-on-Trent, and a cluster of landscapes and attractions that have national pulling-power including The Peak District, Alton Towers, Drayton Manor, the National Forest, and Wedgwood. In time Newcastle-under-Lyme has the potential to join the list as the UK home of circus. Some towns, a set of landscapes, and several attractions have the potential to attract more regional visitors including Lichfield and Leek (market town experiences), Cannock Chase and Trentham Estate (heritage and outdoors activities), Burton upon Trent (brewing), Tamworth (adventure), and Uttoxeter Racecourse and Stoke City FC (spectator sports). Unlike adjacent county locations, Stafford, the county town, is not itself currently a strong driver for the visitor economy and it may be that further product development and accommodation – linked to improved transport links – could be considered.

To maximise the ability of these lead attractions and destinations to deliver volume and value, there is a need to develop and diversify supporting services and facilities to produce a well-rounded offer that offers a great visitor experience, from start to finish.

[6] *A product summary is provided in the appendices and a full product listing is available from Staffordshire County Council on request.*

Wychnor Park Country Club

Uttoxeter Racecourse

Glamping Yurt – Secret Cloud House Holidays

PRODUCT DEVELOPMENT

The existing offer could be described for the most part as generic. And yet to achieve our objectives it needs to be specific and targeted to Staffordshire. And sectors like hospitality, food and drink, and retail also need to become more distinctive, have a stronger Staffordshire character, and cater to a broader range of visitor types. For this plan, however, the product development focus over the next three years needs to be accommodation. This will require strengthening relationships with planning teams across the county.

Staffordshire has already invested in a substantial study, the 2019 Hotel and Visitor Accommodation Development Strategy, which contains a set of clear recommendations to fill Staffordshire's accommodation gaps. Work should start on delivery as soon as possible and early priorities are the diversification of the rural accommodation offer, including lodges, holiday parks, caravanning/camping sites, and glamping, as well as a boutique hotel offer in the market towns and Stoke-on-Trent.

Increasing the quantity of rooms and the choice of accommodation types is one of the fastest ways to grow the value of the visitor economy and will require public and private sector investment.


Doubletree Hilton Hotel – Chester

CASE STUDY

In 2013 Chester began to promote itself to property intermediaries and international operators. In 2017 Colliers named Chester the no1 destination for hotel investment. There followed a Moxy Hotel (Marriott), Hotel Indigo (IHG), a new Travelodge, a Leonardo (Jurys Inn) and a number of high-end boutique propositions. Hotel occupancy in Chester is around 75% despite expansion and the Covid pandemic – higher than Liverpool and Manchester. Cheshire's visitor economy is worth circa £3bn. Much recent growth has been achieved by increasing the number of hotel beds.

ACTIONS	
• Review progress on delivering the recommendations of the 2019 Hotel and Visitor Accommodation Development Strategy	WITHIN 9 MONTHS
• Identify opportunities to expand existing, and develop new, family accommodation in rural areas, specifically lodges, glamping and farm stays	APPROX 9-18 MONTHS
• Proactively invite hotel investors to consider selected locations for boutique hotel development, especially Lichfield, Leek, and Stoke-on-Trent	APPROX 18-36 MONTHS

OUTCOME

- MORE INVESTMENT
- MORE RESILIENT, PROFITABLE AND SUSTAINABLE BUSINESSES
- MORE STAYING VISITORS

3 MARKETING

There is a consensus that the marketing of Staffordshire as a collective has been less effective than it should be. As well as a lack of distinctive identity, attractions and brand marketing have stood alone, and there has been an acknowledged lack of collective effort. Because of this our area has not yet developed a distinctive identity. Of course it is not alone and many English counties (particularly those that are large, that have a mix of cities, towns and landscapes, but no overriding distinctive features) face a similar challenge.

Additionally, the county's nationally-significant attractions and brands are marketed stand-alone. They are not associated with the county, and so Staffordshire's image, reputation and profile is not generally able to benefit more widely by their presence.

In recent months, using Enjoy Staffordshire as the key delivery vehicle, the Staffordshire Place brand has taken on a fresh energy with regards the visitor economy with the proposition that Staffordshire is:

> **Britain's biggest and best playground**

As a concept, this is starting to gain traction, but it is in its infancy. This plan recommends developing a narrative framework for businesses to draw on and tell their own stories within the broader concept of entertainment, play and leisure. It also recommends that businesses should be provided with a basic brand toolkit to help them incorporate key messages into their own marketing, and to help create a critical mass of promotion that will, over time, raise awareness, change perceptions and enhance the county's image.

Good marketing is targeted at clearly-defined audiences. In parallel to developing the brand proposition and core messaging, an agreed set of visitor segments should be identified, described clearly and communicated widely. The result will be more-focused promotion, targeting those potential visitor groups who are most likely to respond positively.

Marketing activity, packaging, and PR can also be used to attract more visits. Work has already started on packaging with three new itineraries almost ready for use (focusing on two-night breaks across the breadth of the county), plus a further nine that will be brought forward. The itineraries have also highlighted some strong PR hooks that can be used in the short and medium term to raise the profile of the area. This plan recommends that content is collated and distributed more widely and more effectively to increase marketing reach.

CASE STUDY

In March 2021 during the first lockdown, Herefordshire employed Travel Tonic PR to begin the task of building a story about Herefordshire that would position the county as "cool, green and delightfully off-grid". This coincided with editors looking for new domestic destinations for when lockdowns ended. In parallel a series of itineraries were developed to target various audiences and also to lure journalists to come on familiarisation visits to explore first-hand cider circuits, slow shopping, the Watkins Way, roasts and rambles, hideous histories and so on. This strategy generated enormous amounts of virtually unchallenged coverage and an ROI of circa 60:1.

Herefordshire – Cider Producers

MARKETING

ACTIONS

Develop a narrative that animates the visitor experience in Staffordshire, for use across the partnership, with support from, and engagement with, the wider Staffordshire Story/Place narrative	WITHIN 9 MONTHS
Create a light-touch brand toolkit for visitor economy businesses to use across their marketing activity that compliments and ties into other Place branding across the county, such as *We are Staffordshire*	WITHIN 9 MONTHS
Identify and agree target visitor segments based on Visit England segmentation model, mapping segments to sub-county-destinations	WITHIN 9 MONTHS
Map agreed visitor segments across Staffordshire and Stoke- on- Trent for targeting purposes	WITHIN 9 MONTHS
Develop visitor profiles for target segments and communicate widely	WITHIN 9 MONTHS
Create digital content that communicates the proposition to the consumer, layering the content according to audience, so, lead with strong brands and attractions for regional and national audiences	APPROX 9-18 MONTHS
Create a monthly/quarterly content distribution plan (local, regional and national channels) and proactively feed them with digital content	APPROX 18-36 MONTHS
Prepare the pipeline of consumer facing itineraries for publication	WITHIN 9 MONTHS
Engage a PR agency to generate coverage and manage press visits	9 MONTHS - ONGOING
Work with the newly-established Place PR steering group to maximise publicity efforts.	9 MONTHS - ONGOING

OUTCOME

- INCREASED MARKETING IMPACT
- A STRONG AND INCLUSIVE PARTNERSHIP
- RECOVERY AND GROWTH ACROSS THE INDUSTRY
- DRIVES A POSITIVE PERCEPTION/IMAGE OF PLACE

4 INCLUSIVITY & CONNECTIVITY

We recognise that many of our rural areas are continuing to strive for improved broadband connectivity, and that businesses in these areas are less likely to have a fully-developed online presence and access to digital distribution channels as a consequence. And yet, from a visitor economy perspective, we need now - more than ever - to break barriers to entry, to accessing product information and to booking services, as well as to ensure that our offer is fully-accessible and inclusive.

Since the start of the pandemic we are seeing much more use of digital, and so we recognise that we need to step forward and support our SME business and leisure communities. We must make sure that we venues, destinations and localities can connect in the right way, with the right visitors, at the right time, and that they can leverage all opportunities for pre-bookings, planned excursions and visits, and scheduled attendance, with ease.

Alongside this, our Plan looks to further support our destination to fully utilise and embrace digital marketing and distribution, including the creation of digital assets, distribution of digital content, and proactive management of online image and reputation (which are all addressed further under Marketing).

We will prioritise all opportunities to ensure our visitor experience is accessible and inclusive – from digital engagement, through to physical experience, as we strive to offer the highest quality service in all we do.

CASE STUDY

A Covid-recovery programme in Somerset focused on meeting the needs of visitor economy businesses by filling knowledge and skills gaps on a range of subjects including marketing, product development, business planning, and experience development. The topic of highest interest was online presence. Businesses wanted help with social media content, website design, online visibility via search engines and choosing the right booking and distribution systems. The programme provided 1-1 mentoring with expert advisors as well as a series of webinars on digital topics, and delivered over 230 digital support sessions.

ACTIONS

Identify gaps in digital capability focusing on small businesses, specifically marketing skills, online booking, online distribution.	WITHIN 9 MONTHS
Audit existing provision for upskilling of digital capability and assess its appropriateness for visitor economy businesses.	WITHIN 9 MONTHS
Influence existing or create new support programmes to bring visitor economy businesses up to a minimum standard of digital knowledge and skill	WITHIN 36 MONTHS
Identify areas where businesses struggle to operate online and remedy any under-served areas with broadband/superfast connectivity	WITHIN 36 MONTHS

OUTCOME

- MORE SUPPORT FOR THE SECTOR
- MORE RESILIENT, PROFITABLE AND SUSTAINABLE BUSINESSES
- RECOVERY AND GROWTH ACROSS THE INDUSTRY
- IMPROVED VISITOR EXPERIENCE

Trentham Gardens

5 SKILLS AND TRAINING
6 BUSINESS SUPPORT

There is a consensus that skills, training, and business support share a common challenge... A lack of awareness about the current provision, business needs, or demand.

The reason for this lack of knowledge appears to be, at least in part, down to loose relationships between the delivery agencies and the businesses they serve. Whilst certainly partly-exacerbated by the pandemic, it's also a consequence of funding being routed through local authorities which each naturally have their own priorities (in respect of sectors to focus on and types of support to provide). The lack of visitor-economy-focused business networks in the area that can collate and articulate these needs may also be a factor.

This Plan therefore recommends (for reasons of efficiency and potential cost savings) one overarching study to take place in the first year of implementation. The study will seek to audit the current provision, gather data, and elicit information directly from businesses around their needs. Once complete, the study will inform the interventions that are required and they can be added to this Plan.

5 SKILLS AND TRAINING

Skills development is an acknowledged priority, and the link between a skilled workforce and a good visitor experience is well understood. Staffordshire's employment and skills task group meets fortnightly, bringing together the key providers of skills and training which includes colleges, local authority services, and private sector providers to direct resources to priority areas and respond to need. This group is data and demand-led. It's recommended that more clarity is provided by the DMP to advise on the true needs around skills and routes to employment for current providers.

Future interventions should be focused as much on upskilling people currently working in the sector, as those on HE and FE courses training to start work in the sector.

ACTIONS	Timescale
Audit the existing provision for skills development	WITHIN 9 MONTHS
Assess skills development needs across the sector	WITHIN 9 MONTHS
Match the existing provision against the need to identify gaps	WITHIN 9 MONTHS
Proactively feed visitor economy intelligence to the Staffordshire skills and employability group	APPROX 9-36 MONTHS
Develop dedicated actions for skills development and add to this plan	APPROX 18-36 MONTHS
Develop a sector-based Ambassador programme to highlight job and career opportunities, and to improve its reputation, building on existing Ambassador programmes such as *We are Staffordshire*	ONGOING

OUTCOME

- MORE SUPPORT FOR THE SECTOR
- MORE RESILIENT, PROFITABLE AND SUSTAINABLE BUSINESSES
- RECOVERY AND GROWTH ACROSS THE INDUSTRY
- IMPROVED VISITOR EXPERIENCE

6 BUSINESS SUPPORT

For small visitor economy businesses, which make up the majority in our area, dedicated support has been a lifeline during the pandemic. Help has been provided by a range of organisations including the Growth Hub, district and borough business support services, the Chamber of Commerce, universities and private sector providers. Support is available for HR, marketing, digital skills, accessing funding, and customer service. However, most support is generic and isn't necessarily tailored to meet the specific needs of visitor economy businesses. The reason for this appears to be a lack of clarity over what exactly is needed, exacerbated by a complicated landscape of provision that can be difficult for businesses to navigate. As for skills and training, the immediate priority is to map what is available, assess its suitability and identify needs.

McArthurGlen shopping outlet

ACTIONS	Timeframe
Audit the existing provision for business support	WITHIN 9 MONTHS
Assess business support needs across the sector	WITHIN 9 MONTHS
Match the existing provision against need to identify gaps	WITHIN 9 MONTHS
Market existing relevant provision to the sector	WITHIN 18 MONTHS
Develop dedicated actions for business support and add to this Plan	APPROX 18-36 MONTHS
Fill gaps with precise and targeted programmes	WITHIN 36 MONTHS

OUTCOME

- MORE SUPPORT FOR THE SECTOR
- MORE RESILIENT, PROFITABLE AND SUSTAINABLE BUSINESSES
- RECOVERY AND GROWTH ACROSS THE INDUSTRY
- IMPROVED VISITOR EXPERIENCE

7 SUSTAINABILITY

Sustainability is a focus of nearly all the strategies and plans relating to Staffordshire's visitor economy, whether specifically or for related areas such as economic, rural, community, and landscape management. And yet what it actually means in strategic and practical terms is less clear.

This is surprising given the knowledge and expertise at Keele University (top five nationally for sustainability research) and the Staffordshire Business and Environment Network (SBEN) which has a well-established services and events programme. Looking at the SBEN membership there is little representation and/or engagement from visitor-economy-focused businesses.

And so the immediate task must be to define what sustainability means for Staffordshire's visitor economy, deciding on an objective or objectives that stakeholders can work towards and agreeing the outcomes that can be achieved as a result of this.

We expect that this may cover the ways in which collaboration can reduce waste, increase the sharing of best practices, and introduce or reinforce any circular economy prinicples.

At the business level it means mapping provision and identifying need. Some auditing and surveying work is recommended, and for reasons of cost and efficiency this would be best incorporated into the study recommended under business support and skills.

A wider strategic consideration is whether to adopt a sustainable development model such as VERB (Visitor, Environment, Residents, Business) for all visitor economy activity.

ACTIONS	Timeframe
Form a visitor economy sustainability working group	WITHIN 9 MONTHS
Decide on an approach to sustainable tourism development such as adopting the VERB model and adding a sustainability objective and target(s) to this Plan	WITHIN 9 MONTHS
Source or create audit-style data on existing sustainable business practice	WITHIN 9 MONTHS
Design and deliver an environmental efficiency programme for visitor economy businesses	WITHIN 18 MONTHS
Clarify with the industry the most relevant sustainability interventions	APPROX 18-36 MONTHS
Create a B2B campaign highlighting benefits of sustainable business practices	WITHIN 36 MONTHS

OUTCOME

- MORE SUPPORT FOR THE SECTOR
- MORE RESILIENT, PROFITABLE AND SUSTAINABLE BUSINESSES

NEXT STEPS

By adopting the VEAP, stakeholders across Staffordshire are committing to work together to help the visitor economy reach its potential.

The first 12 months of delivery will be critical in laying the foundations for a stronger and more effective partnership that can drive progress and champion the sector.

The work will absolutely require goodwill, imagination, and positivity from all those who stand to benefit. In particular, it will require open and honest dialogue, a positive attitude, sharing of knowledge and resources and a willingness to adapt and compromise to arrive at the best solutions for Staffordshire as a whole.

The VEAP will be monitored and reviewed at regular intervals, and the next significant progress report will be due in December 2024.

For more information, please contact: info@enjoystaffordshire.com

Cannock Chase

OUR BOARD MEMBERS

Organisation	Representative
Alton Towers Resort	Francis Jackson
Canal and River Trust	James Dennison
Doubletree by Hilton Stoke-on-Trent	Claire Furnell-King
Drayton Manor Park	Victoria Lynn
Lichfield Cathedral	Simon Warburton
The National Forest Company	Louise Driver
National Memorial Arboretum	Maria Howes
National Trust	Hayley Mival, Shugborough
Staffordshire Waterways Group	Julie Arnold
Staffordshire Wildlife Trust	Julian Woolford
Staffordshire Conference Bureau	Claire Williams
TMI	Paul Williams
We are Staffordshire	Louisa Shaw
Weston Park	Andrea Webster (Chair Marketing Sub-group)

The Public Sector members are:

Cannock Chase District Council	Cllr. Mike Sutherland
East Staffordshire Borough Council	Cllr. Bev Ashcroft
Lichfield District Council	Cllr. Iain Eadie
Newcastle-under-Lyme Borough Council	Cllr. Jill Waring
Peak District National Park Authority	Cllr. Andrew Hart
South Staffordshire Council	Cllr. Terry Mason
Stafford Borough Council	Cllr. Frances Beatty
Staffordshire County Council	Cllr. Philip White (Chair)
Staffordshire Moorlands District Council	Cllr. Keith Flunder
Stoke-on-Trent City Council	Cllr. Lorraine Beardmore
Tamworth Borough Council	Cllr. Robert Pritchard

WHAT MAKES STAFFORDSHIRE SPECIAL?

Pre-pandemic, the tourism and hospitality sector was the fastest growing industry in the UK. It remains a springboard for future economic growth within our county

A PROUD PARTNERSHIP

Working together across the public, private and voluntary sectors we will position Staffordshire as a great place to visit, stay and enjoy

WITH ONE GOAL...

We'll encourage more visitors, to stay longer, experience more, and return!

It's better for business and jobs, with more opportunities for local people too

UK'S BIGGEST & BEST PLAYGROUND

CENTRAL

At the centre of the UK, over 75% of the population can be in Staffordshire in under 3 hours

GREAT LINKS

4 major airports bring over 3m visitors in our direction

Home to

1.1 MILLION

residents

plus

16,000

students

Tourism is worth

£1.87 BILLION

This adds up to

28 MILLION

visitor trips

Supporting

33,000+ JOBS

Home to

BEST-IN-CLASS ATTRACTIONS

NATIONALLY-PRIZED TREASURES

From the Staffordshire Hoard to the National Memorial Arboretum

Staffordshire is the

BIRTHPLACE OF THE CIRCUS

OUTSTANDING OUTDOORS

The only UK county with a National Park, National Forest **and** an AONB

Home to the

UK'S BREWING INDUSTRY

More miles of

CANALS

than any other 'Shire'

HERITAGE AND CULTURE

Over 1000 years of history we have incredible stories to tell – from Saxons to scholars

Stoke-on-Trent

WORLD CAPITAL OF CERAMICS

CREATIVITY

Nationally known for our creative heritage, Staffordshire helps make Britain Great!

STAFFORDSHIRE VISITOR ECONOMY ACTION PLAN 2022 APPENDICES

CONTENTS

Trentham Gardens

PRODUCT SUMMARY

The information below is an overview of the product offer of Staffordshire and Stoke-on-Trent. It's drawn from a more comprehensive product audit compiled by Staffordshire County Council and Keele University in 2022. It summarises the components of the Staffordshire offer that are most likely to attract regional or national visitors, and focuses predominantly on leisure.

Although Staffordshire is a rural county in the main, its proximity to Birmingham, Derby, Crewe, and Manchester means it does not enjoy an entirely "green and pleasant" image. This isn't necessarily negative for the county. What is going on in the area is appealing:

- A significant number of family attractions of which the most famous is Alton Towers Resort
- The magnificent heritage of The Potteries and in particular Wedgwood, with international appeal
- A significant Area of Outstanding Natural Beauty (Cannock Chase) and other renowned landscapes and gardens such as the Peak District National Park and Trentham
- A number of charming market towns, such as Leek in the Staffordshire Moorlands and the city of Lichfield with its Gothic Cathedral and vibrant arts scene
- Two highly rated universities
- Several attractions that would appeal to traditional male interests – National Brewery Centre, St George's Park, and Stoke City Football Club
- Several attractions with specific female appeal – Emma Bridgewater and McArthur Glen Designer Outlet
- The city of Stoke-on-Trent is at the centre of the ceramic story and a destination for business visits

Staffordshire has an extensive network of canals including the Birmingham and Fazeley Canal, Caldon Canal, Coventry Canal, Shropshire Union Canal, Staffordshire and Worcestershire Canal, and Trent and Mersey Canal.

Destinations with something to offer the tourist for more than a few hours are: Burton on Trent, Cannock, Leek, Lichfield, Newcastle-under-Lyme, Stafford, Stoke-on-Trent, Tamworth, and Uttoxeter.

Access

The main motorway access into the area is via the M6, the M6 Toll, the M54, and the M42, with the A50 and A38 trunk routes also providing strong access.

The main rail routes into principal destinations are:

- West Coast Mainline into Stafford, Stoke-on-Trent, Lichfield and Tamworth, with Crewe on the doorstep
- Cross Country into Burton on Trent and Tamworth
- Regional lines from Crewe and Birmingham into Cannock, Lichfield, Stoke-on-Trent, and Uttoxeter.

Accommodation

- 677 accommodation establishments
- 27,000 bedspaces
- 312 private rooms listed on Airbnb as home stay options, circa 600 bedspaces
- Few 4-star hotels, few branded 3-star hotels
- B&Bs, guest houses and pubs with rooms – generally small in scale and variable in quality.
- 9 hostels

- 100 sites for camping and touring-caravans and motor homes
- 13 canal boat holiday hire operators and a significant supply of privately-owned canal boats moored at twelve marinas for leisure use
- 281 non-serviced visitor accommodation establishments, but little of scale in the countryside

Overall there is annual capacity for just over 10 million overnight stays.

Hotel brands that are present in the area include: Doubletree, Hilton, and Marriott, plus budget brands Premier Inn, Ibis, Travelodge, and Holiday Inn Express.

Some of the big self-catering brands, such as Sykes Cottages, have few properties in the area and do not include Staffordshire in their geographical search criteria.

Hotels are concentrated in the main towns and cities and dominated by budget hotels and small-to-medium sized independent 3-star hotels of varying quality. There is limited provision in terms of boutique hotels, aparthotels and country house hotels. A handful of hotels are promoted as destinations for spas and golf.

There has been little new hotel development in the past five years and some budget and upper tier budget hotel brands are not represented. There is low investment in products that are being actively-developed in other locations, such as budget boutique hotels, lifestyle hotels, branded aparthotels, university conference hotels and golf resorts.

Staffordshire has also been slow to capitalise on emerging innovative non-serviced accommodation products. There is some limited development in terms of boutique self-catering, camping pods, and glamping, but no recent development of holiday lodge parks, eco lodges, holiday resorts, luxury camping, glamping and caravan resorts, motorhome stopovers, boutique bunkhouses, children's activity holiday centres, and pop-up glamping at wedding and events venues.

Activities

- Brewery tours
- Cannock Chase Trekking Centre
- Churnet Valley and Foxfield steam trains
- DriveMe super cars
- Go Ape (high ropes)
- Guided walks / AR trails in Tamworth and Lichfield including the Darwin Walk, the Sculpture Trail and Brass Rubbing Trail
- Halfpenny Green Vineyard tours
- Midlands Karting
- National Forest llama treks, Northfield Farm Trekking (equestrian)
- Pottery making
- Rock climbing at The Roaches
- Snowdome
- Tittesworth Watersports, Waterworld Aqua Park

Attractions – family

- Alton Towers Resort
- Drayton Manor Resort
- Lower Drayton Farm
- McArthurGlen Designer Outlet
- National Forest Adventure Farm
- Peak Wildlife Park
- Snowdome
- Waterworld
- Five heritage railways including Chasewater, Churnet Valley, and Foxfield
- Five Children's Farms

Attractions – Heritage and Culture

- Ancient High House
- Emma Bridgewater Factory
- Erasmus Darwin House
- Gladstone Pottery Museum
- Lichfield Cathedral
- Middleport Pottery
- Moorcroft Heritage Visitor Centre
- National Brewery Centre
- National Memorial Arboretum
- Potteries Museum and Art Gallery (Staffordshire Hoard, Spitfire Gallery)
- Shugborough (NT)
- Stafford Castle
- Tamworth Castle
- Weston Park Country House and Gardens
- World of Wedgwood

There are relatively few National Trust properties and English Heritage has a light footprint in Staffordshire compared to other counties, but this is made up for by its rich design and pottery offer and connection with nationally-known cultural institutions like the V&A. The county has many free attractions including Izaak Walton's Cottage, Samuel Johnson's Birthplace, Tutbury Castle (Mary Queen of Scots) and the Staffordshire Regiment Museum.

Hospitality and retail

- Michelin starred restaurant – Upstairs by Tom Shepherd Michelin Bib Gourmand – Duncombe Arms (10 rooms)
- 5 Michelin Guide restaurants including Larder
- 7 AA Guide rosettes including Three Horseshoes Country Inn, The Boat Inn, Red Lion, The Moat House
- 7 pubs recommended in the Good Pub Guide including The George.
- Worth making an effort for: The Flintlock, The Four Seasons at Swinfen Hall, Meynell Ingram Arms, Orange Tree Bar and Grill, Lunar by Niall Keating, No 26 by Aston Marina

The hospitality infrastructure is good with around 300 restaurants, pubs, cafés, tea rooms and bars, although arguably there are not as many high-end restaurants as there are in adjacent areas such as Cheshire and Derbyshire. McArthurGlen Designer Outlet is a strong retail destination and there is some indication that many market towns and cities offer good independent shopping, such as Leek and Lichfield. Gallery 3, Trentham Shopping Village, Portmeirion Factory Shop, and Tamworth Street Market are all also recommended on Tripadvisor and well received.

Landscapes, gardens, waterways

- Biddulph Grange Garden (NT)
- Cannock Chase AONB
- Churnet Valley
- Dovedale
- Dorothy Clive Garden
- Kinver Edge and Rock Houses (NT)
- National Forest
- National Memorial Arboretum
- Peak District National Park
- The Roaches
- Trentham Estate
- Six canals including the Caldon, Coventry, Shropshire Union, Trent and Mersey, Staffordshire and Worcestershire, and Wyrley and Essington
- 14 country parks
- Four lakes with visitor appeal – Rudyard, Tittesworth, Blithfield, and Chasewater
- 30+ nature reserves including two RSPB reserves

Major events and festivals

- British Ceramics Biennial
- Camp Bestival (Weston Park)
- Classic Ibiza (Weston Park)
- St George's Day Festival (Tamworth Castle)
- Ironman 70.3 Staffordshire
- Leek Arts Festival (folk)
- Lichfield Festival (music, arts)
- Love Cheese Live, Stafford
- Midlands Grand National, Uttoxeter
- Music at Cannock Chase
- Scarefest at Alton Towers
- Seasonal events like Christmas at Snowdome, and winter illuminations
- Stafford Shakespeare Festival
- Staffordshire County Show
- Stone Food and Drink festival
- Trentham Live (Trentham Gardens)

Sports

- JCB Golf and Country Club
- Port Vale Football Club
- St George's Park
- Burton Albion Football Club
- Uttoxeter Racecourse

Theatres and art centres

- Lichfield Garrick Theatre
- New Vic Theatre
- Regent Theatre
- Stafford Gatehouse Theatre
- Victoria Hall

Visitor Facilities

- Birches Valley Forest Centre
- Cannock Chase Visitor Centre
- Staffordshire Moorlands Tourist Information, Leek
- Stafford Visitor Information Centre
- Stoke-on-Trent Tourist Information Centre
- Tamworth Tourist Information Centre
- Tittesworth Water Visitor Centre

Walking and Cycling routes

- Cannock Chase Mountain Bike Trails
- Greenways cycle routes at Leek, Oakamoor, Stafford
- The Manifold Track
- National Cycle Network Routes
- National Forest Way
- The Staffordshire Way
- Two Saints Way
- Way for the Millennium

Visitor Economy Facts and Figures

Figures provided here are for 2019, pre the Covid-19 pandemic and are taken from the 2020 Economic Impact for Tourism study by Research Solution. As well as providing headline figures for 2019, the study shows that Staffordshire suffered a similar level of downturn in 2020 to many other English counties, with volume and value reducing by over 50% on most measures. It's estimated by VisitEngland that a full return to pre-pandemic levels of activity, volume and value, will be achieved by 2025 at the earliest.

	VOLUME	VALUE	AVG. SPEND PER TRIP	SEASONALITY
DAY TRIPS	26,601,000	£1,099,586,000	£41.34	20% TAKEN JULY/AUG
OVERNIGHT TRIPS	1,555,000	£249,508,000	£160.46	26% TAKEN JULY/AUG
TOTAL	28,156,000	£1,349,094,000	-	-

TOTAL VALUE OF TOURISM £1,876,374,550 (including indirect and induced spend)

THE NUMBER OF JOBS SUPPORTED BY THE VISITOR ECONOMY IN 2019 WAS 32,844. IT IS THE COUNTY'S 4TH LARGEST EMPLOYMENT SECTOR

AVERAGE LENGTH OF STAY FOR OVERNIGHT TRIPS: 3.11

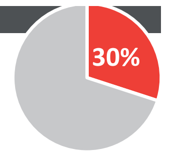
MAIN PURPOSE OF TRIP: HOLIDAY, BUSINESS, VISITING FRIENDS AND RELATIONS

Staffordshire does not appear to suffer from seasonality to the same extent as other English destinations, though the 2017 segmentation study identified the main season as March to September. There is more seasonality for overnight than day trips. Seasonality is likely to vary and be more apparent in rural areas of the county.

The origin of most visitors to Staffordshire is the UK.

Accommodation and Food and Drink are the sectors that benefit most from the expenditure of staying visitors. Shopping and Food and Drink benefit most from the expenditure of day visitors. Visitor attractions receive the lowest % of visitor spend of all the main visitor economy sectors.

VISITENGLAND VISITOR SEGMENTS AND PROFILES



#1 Country-loving traditionalists

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

INCOME AVERAGE

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

LIFESTAGE

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

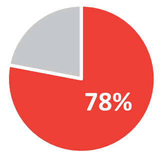
LIVE

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

MEDIA

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

ENGLAND TOURISM



Visited England in the last 12 months

2.37 holidays a year (typical share of holiday type)

ON THEIR MOST RECENT TRIP...

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

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

54%

Booked directly through the accommodation provider, not an intermediary

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

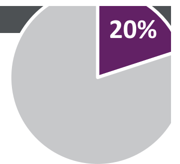
TOP PRIORITIES IN CHOOSING A HOLIDAY

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

ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

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

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



#2 Fun in the sun

Typically families looking for sunshine or summer holidays where beaches play a starring role. The number of holiday-makers to be catered for on a moderate household income means that they are likely to take fewer breaks than other segments (2 per year) and seek cheaper, more 'social' alternatives to hotel accommodation, such as caravans or holiday camps.

INCOME AVERAGE

Although slight skew towards the middle bracket (55% in £20K-£45K)

LIFESTAGE

Married/living with partner **(75%)**; half with children. **47%** are aged 35-55 years

Skew female: 56%

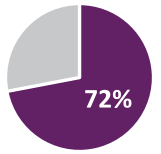
LIVE

More likely to live in West and South West (24%, Index* 114)

MEDIA

Lower than average consumption of broadsheets **(15%)** and strong users of social media **(68%)**

ENGLAND TOURISM



Visited England in the last 12 months

2.0 holidays per year (typical share of holiday type)

ON THEIR MOST RECENT TRIP...

Typically a seaside break **(86%)** for at least 3 people **(59%)**

More likely than other segments to stay in a caravan **(22%)** or holiday camp **(12%)**

41% travelled in the summer; more 'seasonal holidaymakers' than other segments

Spent time at the beach **(83%)**, shopping **(59%)** and/or exploring a small town **(50%)**

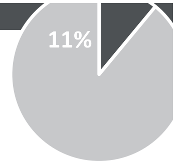
TOP PRIORITIES IN CHOOSING A HOLIDAY

	% T2B importance	Index*
Good range of outdoor activities	46%	**128**

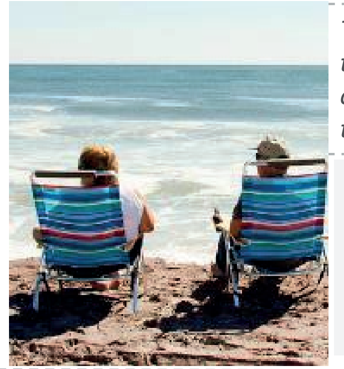
ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

	Index* of mean score**
Is good for families with kids	114
Has good beaches	114
Makes me want to return again and again	110
Has a sense of excitement and adventure	110
Is fun	109
Is good for people younger than me	109
Makes me feel like I've had a proper holiday	108

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



#3 Fuss-free value seekers



Typically empty nesters on a budget, they seek good value beach holidays with convenient transport links. Although they tend to book hotel accommodation, cheaper alternatives are also considered. Fuss-free value seekers are less digitally active than other segments, being less likely to engage in social media or book their holiday online. They are, however, avid consumers of the mainstream tabloid press.

INCOME LOWER

Skew towards much lower household incomes. 65% with HH income <£20K

LIFESTAGE

More likely than other segments to be single **(36%)**; and not live with children **(73%)**. **Nearly half** are aged 55+

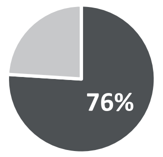
LIVE

More likely to be in East Midlands (10% of total, Index*: 122)

MEDIA

Most likely to read the tabloids **(52%)** and least likely to engage in social media **(60%)**

ENGLAND TOURISM



Visited England in the last 12 months

2.2 holidays per year

⬆ 34%

Would **only** consider England for a holiday or short break

ON THEIR MOST RECENT TRIP...

Typically a seaside break **(53%)** for two **(50%)**

41% stayed in a hotel. More likely than other segments to choose a caravan **(14%)** or holiday camp **(12%)**

53%

Booked their holiday online, but they are the segment **least likely** to do so

Spent time shopping **(49%)**, at the beach **(44%)**, and/or exploring a small town **(34%)**

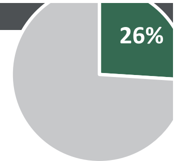
TOP PRIORITIES IN CHOOSING A HOLIDAY

	% T2B importance	Index*
Easy to get around by public transport	50%	**121**
A destination that is easy to get to by public transport	45%	**120**
A destination that doesn't take too long to get to	61%	**117**
Overall availability of deals and discounts for the destination	62%	**113**

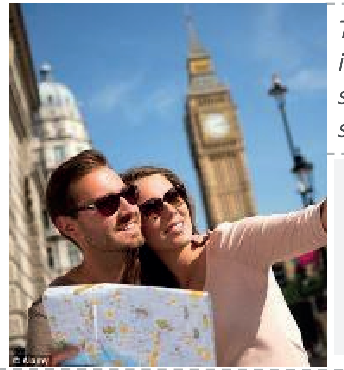
ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

	Index* of mean score**
Is good value	113
Makes me feel like I've had a proper holiday	110
Has good beaches	110

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



#4 Free and easy mini-breakers



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

INCOME AVERAGE

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

LIFESTAGE

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

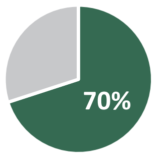
LIVE

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

MEDIA

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

ENGLAND TOURISM



Visited England in the last 12 months

2.1 holidays a year.

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

ON THEIR MOST RECENT TRIP...

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

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

71%

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

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

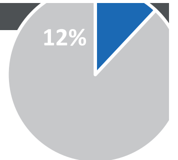
TOP PRIORITIES IN CHOOSING A HOLIDAY

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

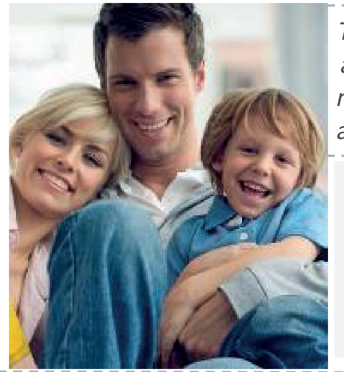
ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

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

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



#5 Aspirational family fun



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

INCOME HIGHER

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

LIFESTAGE

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

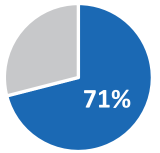
LIVE

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

MEDIA

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

ENGLAND TOURISM



Visited England in the last 12 months

⬆ 2.7 holidays a year

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

ON THEIR MOST RECENT TRIP...

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

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

34%

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

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

TOP PRIORITIES IN CHOOSING A HOLIDAY

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

ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

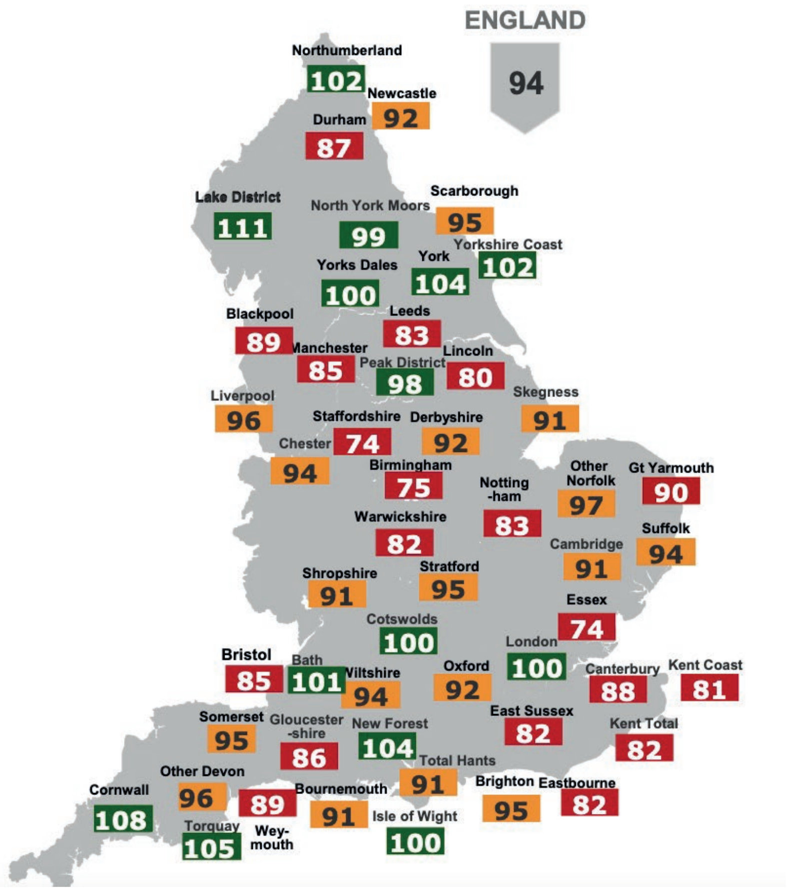
	Index* of mean score**
Offers great entertainment / nightlife	116⬆
Makes me feel like I'm doing less harm to the environment	121⬆

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

STAFFORDSHIRE'S PERFORMANCE ACCORDING TO THE TRIM INDEX OF VISITOR SATISFACTION 2014

Visit England's Trim Index is the most up to date nationwide survey (2014) of visitor satisfaction. **Staffordshire performs significantly below the national average.**

In comparison to the rest of England...

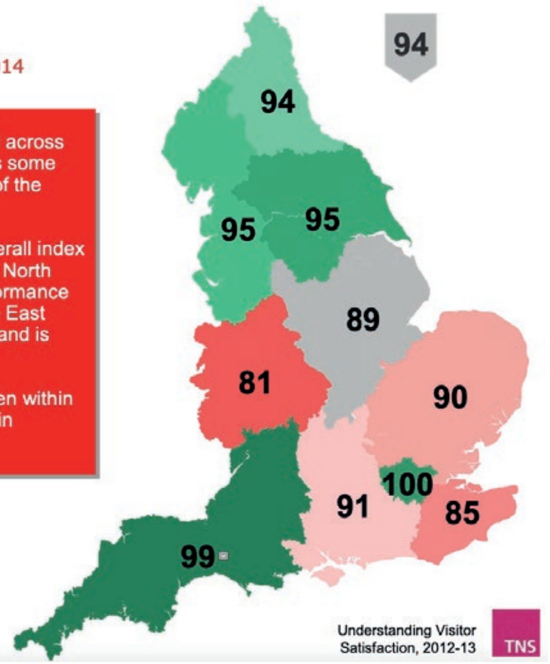


Variations in satisfaction by destination region
(2 year period – July 2012-June 2014

The overall satisfaction index for England across the two year period is 94 – but this masks some fairly large variations across the regions of the country.

Five areas are helping to drive up this overall index – London, the South West, Yorkshire, the North West and the North East. However, performance in the West Midlands, the South East, the East Midlands, the South and the East of England is working against this.

The next slide illustrates however that even within these regions, there are major variations in satisfaction at the destination level........



VisitEngland

Understanding Visitor Satisfaction, 2012-13

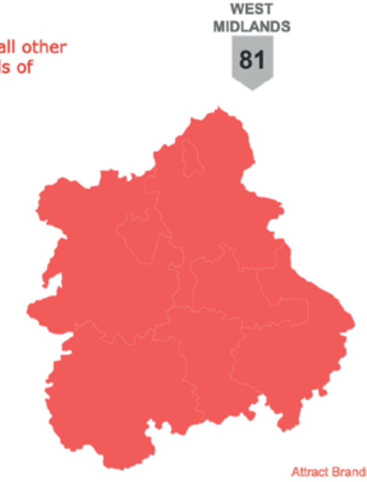
TNS

West Midlands:
Stratford and Shropshire perform best – all other parts of the region have much lower levels of satisfaction

(2 year period – July 2012-June 2014)

Stratford upon Avon	95
Warwickshire	82
Staffordshire	74
Birmingham	75
Shropshire (*)	91

(* - Less than 50 respondents)



Attract Brands

According to the TRIM index, the West Midlands is at the bottom of the table of English regions for visitor satisfaction. When the West Midlands is broken down, Staffordshire is at the bottom of the table for visitor satisfaction. This suggests issues such as customer service and quality need addressing and also that expectations need managing.

STAFFORDSHIRE STAKEHOLDERS:
PRIMARY AND SECONDARY VISITOR ECONOMY STAKEHOLDERS

PRIVATE SECTOR

Primary

Visitor attractions and estates

Cathedrals and principal churches e.g. Lichfield Cathedral

Enjoy Staffordshire (DMP)

Staffordshire and Stoke-on-Trent Local Enterprise Partnership

Independent accommodation providers

Independent historic house owners

Branded hotel groups: Premier Inn, Travelodge, Doubletree, Marriott, Ibis, Holiday Inn

Hospitality businesses

Activity providers and attractions e.g. Snowdome, Waterworld

Tour guides

Cultural Venues e.g. theatres, museums, art galleries

Newcastle under Lyme BID

Stoke on Trent City Centre BID

Secondary

Uttoxeter Racecourse (Arena Racing company)

Stoke City Football Club

Port Vale Football Club

Burton Albion Football

Club Hotel investors

Coach operators visiting Staffordshire

Go Ape

Staffordshire County Cricket Club

Staffordshire Chamber of Commerce and Industry

Staffordshire Connects

PUBLIC SECTOR

Primary

Staffordshire County Council

Stoke-on-Trent City Council

Staffordshire Visitor Economy Partnership Board

Enjoy Staffordshire (DMP)

Visit Stoke

Borough and District Councils: Cannock Chase, East Staffordshire, Lichfield, Newcastle under Lyme, South Staffordshire, Stafford, Staffordshire Moorlands, Tamworth

Town Councils

Staffordshire and Stoke-on-Trent Local Enterprise Partnership

We are Staffordshire

Visitor Information Centres in: Cannock Chase, Lichfield, Leek, Stafford, Stoke-on-Trent, Tamworth.

THIRD SECTOR

Primary

Cannock Chase AONB Partnership

Heritage Railway Trusts

Enjoy Staffordshire (DMP)

Secondary

Stoke-on-Trent and Staffordshire Growth Hub

Staffordshire Wildlife Trust

Create Place Consortium

EDUCATION AND TRAINING

Primary

Keele University

Staffordshire University

South Staffordshire College

Burton and South Derbyshire College

Newcastle and Stafford College Group

Buxton and Leek College

Private sector training providers

NATIONAL/REGIONAL STAKEHOLDERS

Primary

Visit Britain/England

National Trust

English Heritage

Department of Culture, Media and Sport

The National Forest Company

Peak District National Park Authority

West Midlands Combined Authority/ Growth Company

Merlin Entertainments

Canal and River Trust

Arts Council England

Secondary

Natural England

D2N2 (LEP)

Greater Birmingham and Solihull LEP

Attractions in adjacent geographies e.g. Chester Zoo, Ironbridge

Marketing Cheshire

Marketing Peak District and Derbyshire

Shropshire DMO

Warwickshire DMO

TRANSPORT PROVIDERS

Secondary

Birmingham Airport

Manchester Airport

East Midlands Airport

Avanti West Coast (FirstGroup and Trenitalia)

Cross Country Trains

Northern Rail

Arriva Trains Wales

East Midlands Trains

London Northwestern Railway

West Midlands Railway

North Staffordshire Community Rail Partnership

Bus operating companies

Stakeholders contributing to the Staffordshire Visitor Economy Action Plan

Anthony Bamsey, Staffordshire County Council

Anthony Hodge, Staffordshire County Council

Darryl Eyers, Staffordshire County Council

Claire Twaites, Trentham Estate

Tom Robinson, National Forest Adventure Farm

Vanessa Parry, The Lewis Partnership

Zoe Wallis, Bents Brewhouse Ltd

Faith Johnson, Environmental Quality Mark

Emma Clarke, New Vic Theatre

Olivia Thackstone, Fiskars – Wedgwood Steve Alty, Hilton

Todd Newton, Snowdome

Dan Norgrove, Alton Towers Resort Josh Torlop, Trentham Monkey Forest Jayne Speed, Betley Court Farm

Rupert Evans, Denstone Hall Farm Shop & Café

Loren Searcy, Fiskars – Wedgwood

Aspa Evangelopoulou, SSLEP

David Poole, Staffordshire County Council Julie Arnold, Staffordshire Waterways Group Rebecca Lee, McArthur Glen

Matthew Fletcher, Tamworth Borough Council

Kerry Endsor, Moddershall Oaks

Ian Marshall, Cannock Chase AONB

Tim Sharman, Stoke-on-Trent City Council

Stacy Birt, Tamworth Borough Council

Claire Brookes, Staffordshire Moorlands District Council

Charlotte Cain, Staffordshire County Council

Lisa Clemson, Lichfield District Council

Jo Dilley, Marketing Peak District and Derbyshire

Richard Drakeley, The National Forest Company

Darren Farmer, Staffordshire County Council

Debbie Harris, Cannock Chased District Council

Simon McEneny, Newcastle-under-Lyme Borough Council

Becky Frall, West Midlands Growth Company

Caroline Mairs, Make it Stoke-on-Trent and Staffordshire

Catherine Mann, Staffordshire County Council

Maria Howes, National Memorial Arboretum

Hayley Cooper, South Staffordshire Council

Martyne Manning, Stafford Borough Council

Dean Piper, Cannock Chase District Council

Louisa Shaw, We are Staffordshire

Nicola Said, Marketing Cheshire

Andrea Sammons, Staffordshire County Council

Richard Swancott, Staffordshire County Council

Jonathan Vining, Staffordshire County Council

Simon Warburton, Lichfield Cathedral

Claire Williams, Visit Stoke and Stoke & Staffordshire Conference Bureau

Paul Williams, consultant

Trish Reed, Staffordshire and Stoke-on-Trent Chamber of Commerce

Cllr Andrew Hart, Peak District National Park Authority

Cllr Iain Eadie, Lichfield District Council

Cllr Mike Sutherland, Cannock Chase District Council

Cllr Keith Flunder, Staffordshire Moorlands District Council

Cllr Philip White, Staffordshire County Council

Staffordshire

enjoy Staffordshire

Contact the team:
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