



Cheshire East Visitor Economy Strategy

December 2010

Visitor Economy Strategy

Executive Summary

The Visitor Economy is an important contributor to businesses and communities in Cheshire East, generating over £653m per annum to the local economy.

To build on this success and generate further wealth, Cheshire East Council will:

- Help to increase visitor numbers and improve the overall customer experience.
- Build on our historic linkages and location, historic towns, waterways & Canals, Countryside and Cheshire's Peak District to develop the distinctive 'brands' and offers across Cheshire East and the wider sub-region, through coordinated marketing activity.
- Support the development of key projects to enhance the tourism product.
- Promote and develop events throughout the year which celebrate the distinctive strengths and character of Cheshire East, contributing to its economy.
- Make it easier for visitors to plan and book their trip, and to find the information they need to make the most of their stay, developing new approaches to visitor information provision.
- Recognise the value of the day visitor market to the Visitor Economy while also encouraging more staying visitors.
- Support the development of tourism infrastructure, an improved environment and a focus on customer service to ensure a quality visitor experience.
- Work with partners to encourage and facilitate business sector development in areas such as food, equestrian, accommodation, attractions development, skills training and visitor welcome.
- Ensure that Visitor Economy needs and opportunities are taken into account as part of regeneration projects and decisions relating to planning, transport, public realm, events, culture and countryside/greenspace.

The outcome targets we seek to achieve are:

Develop a Visitor Economy with a value of £818m by 2015

Increase jobs directly related to the Visitor Economy by around 1271 over the same period

Increase visitor numbers to Tatton to 1m by 2015

Increase the number of businesses achieving quality accreditation.



Cheshire East Visitor Economy Strategy



Introduction

The Visitor Economy relates to the activity of all visitors within a destination, whether tourists or not. It embraces all the elements that make for a successful and sustainable destination, including the things that attract people to the place, such as the natural environment, our heritage and culture, leisure facilities, food, gardens, parks, events and scenery. It relates to the infrastructure that helps to reinforce and shape the distinctiveness of the area and make it an easy place to visit; the quality of design, transport, parking, interpretation, public spaces and amenities. It is also served by the hotels and pubs, restaurants, theatres and galleries, and the day-to-day services that make a place welcoming and safe.

The Visitor Economy generates economic and social activity for visitors and residents alike. It not only supports jobs and economic well being, but it helps to support facilities and amenities for local communities, encourages residents to stay and spend leisure time in the local area and helps to build distinctive communities, thus increasing local pride and self-confidence. It also enhances the image of an area, turning a location into a commodity, thereby attracting commercial investment from outside the tourism industry by demonstrating to potential investors that the area is good to locate in. It provides a source of income for the natural and built heritage, providing an economic driver for regeneration and new uses for buildings or land.

Purpose

The purpose of this strategic document is to set the context within which Cheshire East Council will support the Visitor Economy to 2015 and beyond. This document sets out the strategic framework within which the Council intends to operate, whether in its own activity, in partnership or in the context of regional/sub-regional priorities. The Council intends to work closely with its partners through a Visitor Economy forum, which is part of the borough wide approach to a Local Strategic Partnership (LSP). Delivery in the context of this framework will be in partnership with local business clusters as well as any related sub-regional organisations and structures. The strategy has also helped to inform and be informed by the wider Visitor Economy strategic framework for the sub-region.

Vision for the Cheshire East Visitor Economy

The overall vision for our Visitor Economy is to maximise its contribution to the economy, employment and quality of life of Cheshire East.

The strategy must focus on quality of product and experience, while be flexible enough to respond to changes in the market, including recessionary impacts. In summary the strategic framework will focus on the following objectives:

- Improving the quality of products and services, helping to deliver increased productivity and better performance for businesses;
- Identifying and celebrating the distinctive offers of Cheshire East, taking advantage of the best the area and its surrounds have to offer.
- Improving the skills of the workforce and the attractiveness of our sector as an employer;
- Enhancing the experience for visitors through improving our public realm, while protecting and enhancing the historic, built and natural environment;
- Supporting and encouraging key projects
- Supporting and encouraging a programme of sustainable events & festivals
- Making it easier for visitors to plan and book their trip, and to find the information they need to make the most of their stay.
- Considering visitor needs in decision making
- Improving customer service and the visitor experience.
- Encourage the development of accessible and environmentally sustainable tourism products/services.



Facts and Figures

Cheshire East's Visitor Economy is worth £653 million to the local economy, with almost 17 million visits to the area during 2008 accounting for around 40% of the sub-region's visitors. Tatton Park is the most visited attraction, delivering an annual net output to the local economy of at least £8.8m. The area's Visitor Economy employs over 10,000 people, with accommodation, food & drink and shopping employing the highest numbers. Day visitors account for 84% of tourism visits, serviced accommodation 7%, while staying visitors visiting friends and relatives accounts for almost 8%. Staying visits generate an average of £36 per head, while day visits account for £23 per head.

The Context

Cheshire East's Visitor Economy

Cheshire's Visitor Economy is worth £1,779m (STEAM, 2008), with Cheshire East contributing £653m (37%) of this. The area of Cheshire East has a number of landmark visitor attractions, including Tatton Park, which is the largest 'paid for' heritage attraction in the North West, and Jodrell Bank, which is highlighted as a sub-regional signature project. Apart from the Local authorities, a number of organisations are either involved in the strategic delivery of the Visitor Economy function or are significant stakeholders. These include Visit Chester and Cheshire (VCC), the sub-regional tourism board, tourism business clusters such as Cheshire Peaks and Plains Tourism Association (CPPTA) and the South Cheshire Tourism Network (SCTN) and stakeholders such as the National Trust, Historic Houses Association, Peak District National Park and British Waterways to name a few. There are also a number of key thematic partnerships represented in Cheshire East including Cheshire's Gardens and Industrial heritage interests.



Apart from destinations and attractions, visitors expect an attractive environment, and facilities including toilets, cafés, shops, clear signs, maps and other information, good public transport, safe roads and easy parking. The importance of good design, whether of individual buildings, of master plans, or of public spaces should not be underestimated; nor should the quality of natural and historic landscapes, a sense of 'wilderness', arts provision and heritage. Along with parks, countryside, rural rights of way and many other less tangible qualities of 'experience', these all contribute to the areas distinctiveness for

both resident and visitor. They all make a key contribution by Cheshire East in supporting the Visitor Economy. It is therefore important in developing a new Council that the needs of the 'Visitor Economy' are embedded in the plans and delivery of all relevant services as well as having a strategic capacity to support or encourage development, promotion, business and partnership working.

Strategic context

Tourism strategies have been in place for the North West and for Cheshire and Warrington for a number of years. Meanwhile at national level a strategy for England was published in 2010 that focuses on how Visit England will market its countryside and rural escapes, its culture and heritage, its contemporary cities and its events and festivals. The changing organisational and funding framework will necessitate a reshaping of the priorities previously identified, so in parallel, a strategic framework for Cheshire & Warrington was published in September 2010 that has revised targets and outlined the themes and approaches that can help deliver the aspirations for the period to 2020. The updated vision for Cheshire and Warrington, '2020: time to meet the challenge', states:

"We will become known as THE destination that offers customers a consistently warm and genuine welcome and experience along with excellent service - and for being 'best in league' at everything that we do."

It goes on to identify four objectives:

- Grow Cheshire's share of visitor markets
- Create places and spaces for great experiences
- Connect our visitors with our experiences
- Make it happen through champions and networks





Other partner strategies that are being updated at present include the Peak District National Park Sustainable Tourism Strategy. Wherever possible, Cheshire East Council has tried to take the opportunity in 2010 to align some of this strategic thinking in preparing its Visitor Economy strategy. However, this has all been done against the background of rapidly changing organisational and funding arrangements.

In addition, there are new duties on Local authorities in relation to the prosperity and economy of their area. The Local Economic Assessment will provide Cheshire East Council and stakeholders with an understanding of how economic conditions and forces shape places at a range of spatial levels. Assembling an evidence base will help develop priority areas for action. The Visitor Economy is an important definable sector of Cheshire East's economy.

Cheshire East's Sustainable Communities Strategy 'Ambition for all' has an emphasis on working with partners to ensure that Cheshire East continues to prosper for the benefit of all residents, businesses and visitors. The role of Local Area Partnerships in influencing local priorities and the involvement of business clusters, associations and Chambers are all of importance in this context. The Sustainable Communities Strategy objectives include having a strong, sustainable economy in which our Visitor Economy will maximise its contribution to economic wellbeing, employment and quality of life. Other policies and strategies of Cheshire East Council have a significant bearing on the success of the Visitor Economy, including the Economic Development Strategy, Local Transport Plan, Local Development Framework, Climate Change Policies and the Rights of Way Improvement Plan. Clearly this is a two way process and Visitor Economy requirements or opportunities also need to influence such strategic thinking and inform their emerging priorities. Finally,

Cheshire East Council has a significant role in service delivery, including culture/heritage, parks, public realm and visitor information as well as running Tatton Park, one of the region's major strategic visitor attractions.

Partnership and organisation

The Visitor Economy of both the North West and the sub-region has been fortunate over the last few years to benefit from public funding support. Close partnership working between Cheshire East Council and Visit Chester and Cheshire (VCC) has delivered significant benefits to the Visitor Economy at both strategic and local level. However, with changes in the economic climate there is still a need for a corporate commitment to the quality of its Visitor Economy offer from Cheshire East Council and a commitment to working through a partnership approach that involves both public and private sector, in order to succeed. We also need to align visitor activity with economic regeneration and the quality of life of our residents in order to deliver the quality destination that is vital.

Cheshire East will continue to work with strategic partners at both sub-regional and local level, building on our business clusters and exploring opportunities to facilitate new ones where of value. Clusters may be sector, theme or destination led.

It is recognised that there are differing perspectives and priorities for local authorities and for tourism businesses – different responsibilities too. Local authorities need to deliver jobs and services for their communities and take care of places, spaces and a strategic overview. Businesses need to run profitable customer-focused enterprises and have to make decisions fast, responding to market forces. However, both share values on quality and customer service and a need for a strong economy, providing a base to create effective local and sub-regional partnerships.

New and evolving sub-regional arrangements will provide a further opportunity to promote the assets of Cheshire East and ensure strategic links across both the sub-region and the rest of the region. Associate membership of AGMA (Association of Greater Manchester Authorities) and cross-boundary working with the Peak District National Park Authorities and other adjoining interests provide further opportunities for strategic partnerships.

At a more local level, business clusters operate effectively to represent the interests of specific geographical or thematic groupings. For example, Cheshire Peaks and Plains Tourism Association is well-established having been in existence for about 25 years and currently having just over 100 members, including attractions, hotels, B&B's, restaurants, pubs



and shops and is broadly aligned with the brand area of Cheshire's Peak District. Another tourism cluster exists in South Cheshire, while others are related to thematic groupings such as Gardens, provide a promotional focus for particular market towns or represent business types such as a large hotel and attraction cluster.

Within Cheshire East, the Visitor Economy Forum will be the main opportunity for partnership working with key stakeholders, in addition to the ongoing relationships, which will be essential to delivering all aspects of the strategy. The forum currently includes Cheshire East Council, VCC, Peak District National Park, National Trust, South Cheshire Tourism Network and Cheshire Peaks & Plains Tourism Association. The importance of the Peak District to the North Eastern part of the Borough emphasises the value of partnership working with the National Park Authority and the equivalent destination management organisation. The National Trust on the other hand is not only a strategic partner, but has significant land, buildings and properties across the Borough. The forum will continue to evolve, taking account of issues, opportunities and priorities, including the need for cross-border cooperation north, south, east and west.

Internally within Cheshire East Council, the linkages with Economic Development, Planning, Health and Well-Being and the Partnerships Team will continue to develop. Delivery mechanisms cannot relate solely on Cheshire East Council but will be through a partnership approach, bringing together expertise and resources to help deliver the priorities outlined in the strategy.

Markets, assets and brands

Cheshire East is well endowed with gardens, market towns, parks, waterways & canals, events and other attractions. Some of these, for example, formed the central platform for the Cheshire Year of Gardens (CYOG) campaign. Of the 'Gardens of Distinction' a significant number are within the area and so the Gardens of Distinction brand and associated markets are of particular interest to Cheshire East. The area will also benefit from the development of Jodrell Bank, a signature project that could eventually see a major development of the science centre and visitor attraction. Tatton Park is already one of the largest visitor attractions in Cheshire and further opportunities for realising this asset are being developed.

Numerous smaller attractions, many closely linked with elements distinctive to their locality, also help to underpin the Visitor Economy of the area. In addition the area is well served by transport connections with the National Motorway network, mainline rail links and Manchester International Airport 'on the doorstep'.

Cheshire East is also well positioned to access markets close to hand, particularly from other parts of Cheshire, Manchester or the Potteries, and with excellent road or rail links from other parts of the Country. The highest proportion of visitors to Cheshire & Warrington are on a day trip, particularly as Cheshire also represents the countryside on the



doorstep of people living in the urban centres such as Manchester. Day trip visitors are very welcome although overnight visitors spend more per head. Day visitors do nevertheless spend money in the local economy and sustain the infrastructure of attractions, restaurants and shops that are essential elements in attracting overnight visitors.

There needs to be a continued focus on getting the most from the day Visitor Economy in the area, something that affects both residents and 'tourists'. That is why we need to get our visitors to stay longer. It means, for example, giving reasons for day visitors to dwell longer or stay on into the evening, and encouraging conference delegates to stay an extra night or two, or to return to enjoy Cheshire at their leisure. We need to attract more high-spending 'Cosmopolitans', whether day visitors or staying visitors, focusing predominantly on pre and post family couples and women. At the same time the area needs to continue attracting families or the 'traditionalist' visitor that tends to have an older age profile and be attracted by gardens, parks, heritage, countryside and the food offer. In addition to day visitors there are important markets for international or domestic staying visitors, including the very important 'visiting friends and relatives' (VFR) market and also for disabled visitors, often travelling with family or a carer.



To meet their high standards and expectations, there is a need to both promote and improve the quality and choice of retail and food & drink, expand events & festivals and to develop the cultural offer. While there needs to be a focus on areas that can add most value there is also a need to consider the vitality of the local cultural offer such as museums, heritage centres, theatres and smaller events that are also important in this regard, especially if they relate to the character and distinctiveness of a place.



Cheshire East's approach will involve a focus on its events, its attractive towns and villages, its countryside and gardens, and its heritage. There is a need to continue to encourage those important day-trippers whilst raising the profile of the sub-region as a short breaks destination. Much of Cheshire East offers a countryside experience, perfect for recharging the batteries after a busy week at work. This can be promoted through a series of thematic brands including equestrian tourism ('Hoof Cheshire'), gardens ('Gardens of Distinction'), waterways, walking, cycling and outdoor activities. The emerging geographic brand of 'Cheshire's Peak District' provides a strong offer for both the cosmopolitan and traditionalist markets, (supported by research undertaken at the end of 2008), particularly when allied with the area's visitor attraction offer. Working with VCC we must also ensure the sub-region wins its share of the legacy opportunities of the London 2012 Olympic and Paralympic Games by focusing on a select number of high profile cultural events that compete on the national stage and realising opportunities presented by training camps.

Cheshire East is well placed in respect to its gardens and heritage assets such as its churches, towns and historic houses but also its textile, canals and rail heritage. Areas such as 'Cheshire's Peak District', with towns including Knutsford, Macclesfield or Bollington, its rural landscape and villages as well as events such as the RHS Show, Tatton Park Biennial, Food shows or the Textile Festival are all important to the character and image of Cheshire East. It is an area with a definable landscape character with a good range of attractions (e.g. historic houses, museums, National Trust properties, canals, Churches and gardens), high profile images (e.g. Tatton Park, Lyme Park, Little Moreton & Jodrell Bank), a high quality of accommodation from farmhouses to hotels and close links to adjoining areas of the Peak District, Manchester and Midlands. It is already in a strong position to raise its profile within the region and sub-region by making the best of its existing assets.

The rural areas of South Cheshire around Nantwich are also an important resource with its own character and assets.



Cheshire's Peak District

Research undertaken at the end of 2008 indicated that many consumers had an understanding of Cheshire's Peak District, highlighting that the 'offer' had many of the Peak District's attributes but with more historic houses nearby, gentle countryside, many gardens to visit and opportunity to visit industrial heritage sites as well. This provides a focus that includes promotion in the sub-regional visitor guide, bespoke post-arrival print, and web-based promotion through cheshirepeakdistrict.com. Discovercheshirepeakdistrict.com and Discoverthegritstonetrail.com will promote the area's outdoor activities and links to its other attractions through map-based itinerary building tools. This provides Cheshire's only geographic brand other than Chester, giving a focus to developing business through association with the brand. Promotion as part of the wider Peak District brand is also vital to exploiting the potential market to the benefit of the area both as a 'gateway' to the Peak District and as a defined Cheshire experience.

There is a significant and relatively affluent day visitor market close at hand, with the presence of the large conurbations of Manchester, Liverpool and Staffordshire as well as Cheshire's own population. In addition, the urban attractors of Liverpool, Manchester and Chester generate a significant number of staying visitors 'on the doorstep'. There is therefore an opportunity through relatively local marketing to exploit the 'visiting friends and relatives' market, attract secondary visits and grow our own loyal visitor base to underpin the attractions economy through day visits.

Research indicates one of the main challenges is that most people do not identify Cheshire as a destination, and that it does not have a very distinctive brand character in people's minds. This perhaps leads us to an approach where specific attractions, places and events and how they are packaged, linked or presented has a more important focus than the broader offer. This can be supported by the use of brands that have resonance with visitors through place, theme or interest. A number of strategic brands relevant to Cheshire East have already been developed for the sub-region through campaigns



related to gardens, local food, events, equestrian and Cheshire's Peak District. Waterways, textiles (e.g. Silk) and heritage themes offer further potential in the future.

Business tourism is also an important facet of the local Visitor Economy and there is a continuing need to add value by focusing on high yield markets, improved service standards and support in developing the market for business outside of Manchester or Chester. There is some evidence of growth potential in business tourism in Cheshire East, including both conference and meetings markets, for which there is a strong product range from stately homes to conference hotels. In addition, a strong market for wedding venues and other family celebrations is of great significance to many of these businesses. Further work may therefore be required to develop and promote distinctive offers within Cheshire East.

Of course attracting the interest of visitors and providing the product that matches their needs are only two of the components of a successful Visitor Economy. Getting visitors to and between the tourism assets is another vital component. The Visitor Economy alone will not bring about investment in transport infrastructure or services but it can be an important dimension in developing a case for investment. The rural location of many of our main visitor attractions creates significant issues regarding car use vs public transport. The protection and enhancement of connectivity, such as between Airports and Cheshire East, between mainline rail and local rail or bus transport, between towns and rural attractions, are important to visitors and the local community alike and should be considered as part of the Local Transport Plan.

Appendix 2 provides a summary of available research.

Gardens of Distinction

Cheshire's Gardens of Distinction is a continuation programme from 'Cheshire's Year of Gardens'08'. It includes a number of programmes to market the gardens offer across Cheshire, promote and develop the RHS Show Tatton Park and assist with business development.

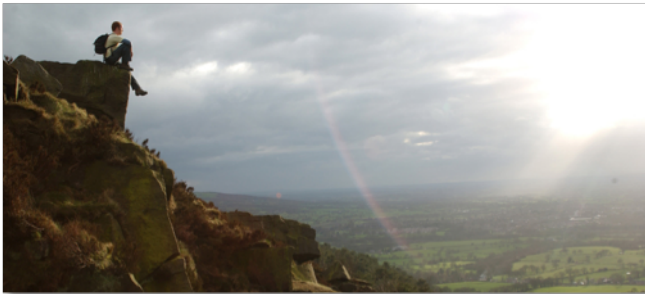
Around 25 gardens are included with many of them being in Cheshire East, including seven of the top ten featured gardens. Cheshire East's gardens, many of them associated with Historic Houses and attractions are therefore an important resource for the Visitor Economy. Analysis of the Year of Gardens campaign indicated a net visitor increase equivalent 277,400 visitors and a net economic impact of £12.2m.

Moving Forward

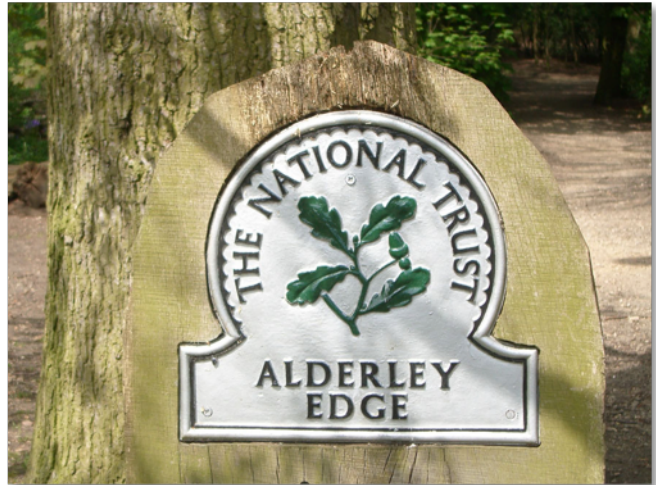
Where do we go from here?

To attract visitors we need to support and reinforce the quality of experience and product in the area's attractions, focusing on developing the full potential of the higher profile assets such as Jodrell Bank, Lyme Park and Tatton Park, while continuing to work with the many other attractions that are scattered across the area such as Clonter Opera, Rode Hall, Macclesfield Silk or Little Moreton Hall.

Maintenance and development of key attractions is of strategic importance to the Visitor Economy of Cheshire East. Tatton Park comes under the direct management of Cheshire East Council, while others will require close working links with organisations such as the National Trust (e.g. Quarry Bank, Lyme Park, Little Moreton Hall) or private owners (e.g. Arley, Capesthorpe, Gawsworth, Clonter and Cholmondeley). At a time of economic slowdown, 'anchor institutions' are important for the local cultural and Visitor Economy in creating a high quality of place with potential to support the resilience of the local economy during a difficult economic period.



Protection and enhancement of our natural assets, including Alderley Edge, the Gritstone Trail, Tegg's Nose, Sandstone Ridge, Meres and Mosses and the distinctive character of the Peak District National Park, is also a fundamental requirement in defining the quality of experience that visitors seek. The features of these landscapes, the historic estates and farmland and their juxtaposition with associated villages, canals, attractions and market towns are a distinct element of the character of Cheshire East and are therefore an economic as well as environmental asset. Helping to develop Cheshire's countryside experience is most effectively done in Cheshire East through a combination of geographic brands where they exist, the use of thematic brands to reinforce the experience, a focus on quality and coordination with strategic developments such as the Rights of Way Improvement Plan. Close working with business clusters, market towns or major property owners such as The National Trust or private estates will also be important.



There should be continued support for the 'Cheshire's Gardens of Distinction' brand as our gardens are already a major visitor attraction. They are something that is distinctive about Cheshire East's contribution to the region, particularly in their association with historic houses and their use as spectacular and distinctive backdrops for arts/culture, festivals and events.

Targeted investment in a number of key projects, attractions and brands will significantly change the image and positioning of Cheshire East in the market place, delivering real benefits to the local economy. Meanwhile 'packaging' for niche markets can help exploit the value of other Cheshire East assets such as Churches, textile heritage, weddings & celebrations or waterways and canals.

Web and digital media need to be effectively used to support and communicate the development of brands and product, adding value to (or in some cases replacing) more traditional communications media. This can lead to cost-effective targeted communication and new opportunities to develop the visitor experience and their access to products.

We should review how and who is providing information and the effectiveness of this, including value for money. Alongside exploring technology and

innovative ways of delivering information it is recognised there will be occasions and locations when information delivered by a person is what the visitor requires. That means exploring how we can collaborate better on delivering joined-up information, whether provided through an information centre, a shop, a visitor attraction, accommodation or at arrival points such as airports or train stations. We need all our residents and businesses to value our visitors and



know about their area, to ensure our visitors get a consistently warm welcome with the right information.

Investment to create the additional accommodation that will allow us to welcome more overnight leisure visitors across Cheshire East throughout the year will require us to focus on destinations and locations with the potential for more and for different types of bed spaces. The emphasis will be on accommodation that fits with our target markets, responding to what today's customers want and underlining our reputation for distinctive, high quality experiences. This includes self-catering options and independent niche accommodation.

Our waterways and rights of way networks need to be recognised as important tourism assets as they are established as important features of our countryside, allowing visitors to explore Cheshire East's hidden gems in a unique way. Demand for both continues to be strong. For example, boating has increased by an average of 2.6% every year over the last 15 years and is expected to continue to grow over the next 10 years, while recent investment of £2.7m in marina development will further encourage canal tourism within Cheshire East. Meanwhile the draft Rights of Way improvement Plan for Cheshire East acknowledges that promoting leisure routes supports local rural businesses.

Events & Festivals

Events held within Cheshire East help animate places and give reasons for return visits, so increasing the value of the Visitor Economy as well as benefiting communities. These events range from nationally strategic events including the RHS Show, Tatton Park Biennial and the Cholmondeley Pageant of Power through to local events & festivals that help to reinforce the character of a particular area, these include Middlewich Folk and Boat Festival, Knutsford May Day, Holly Holy Day in Nantwich, Barnaby Festival in Macclesfield, Carnivals at Crewe and Congleton, The Poynton Show, The County Agricultural Show or the area's many arts, literary and food festivals. Other events help to support tourism brands such as the Bollington Walking Festival and 'Cheshire's Peak District' the many Bluebell Walks and 'Gardens of Distinction' or food festivals and 'Taste Cheshire'.



Our arts, events and festivals programme needs focus, to promote and develop signature events that will raise the profile of the wider offer in Cheshire East and draw specific attention to assets such as gardens or market towns. We can also encourage 'packaging' of other events to ensure they can benefit from an increased profile, are associated with strong themes, gain mutual benefit from clustering with accommodation and other businesses and take advantage of sharing resources. This is especially through cross-marketing opportunities and encouraging greater coordination in timing and organisation to improve impact. There are parallel opportunities to grow 'organic' locally distinctive events and to attract new strategic events. However, a subvention policy may be required to effectively exploit or stimulate the strategic events market and mechanisms to allow active support are necessary to drive improvement in more local initiatives.

The potential of Cheshire East's towns and villages needs to be harnessed through consideration of visitor economy issues within targeted regeneration in



Crewe, Macclesfield and Cheshire East's Market Towns. Effective place marketing is required to make effective use of their distinctive characteristics and local promotional business clusters can help to deliver this. The Visitor Economy and its promotion can also be an important image builder, supporting place marketing. This needs to be achieved through prioritisation, accepting that the needs and opportunities of each place are different and based on whether there is a significant potential gain to the visitor economy. The spatial priorities outlined in its broader Economic Development Strategy of Crewe, Macclesfield and Market Towns are directly relevant to the visitor economy sector, with an additional focus on Cheshire's Peak District, the Tatton/Knutsford/Jodrell hub, the South Cheshire rural area around Nantwich and the canal corridors in respect to business development opportunities related to the market or their assets.

The role of events and festivals, a distinctive retail offer, built heritage, food and drink, quality accommodation, arts & culture, business tourism and proximity of assets such as attractions or waterways will be key variables.

Because of the geography of Cheshire East, business tourism is a different offer to other parts of the sub-region. Proximity to the Manchester city region, the nature of the business mix and its location, the rural nature of much of the Borough and the scattered nature of tourism assets may necessitate a separate focus on business tourism, a clustering approach, development of bespoke products and/or focus on specific business or associated markets. However, the visitor economy is not divorced from normal business and so attention needs to be given to existing plans and partnerships to ensure the visitor economy is firmly rooted in what is already happening uninhibited by sector boundaries. We should support those places that bring together partnerships and projects that are committed to quality and which can deliver for our target audiences.

Market Towns

East Cheshire is home to 15 of the sub-region's 21 market towns and large villages. From Alderley Edge in the north to Audlem in the south, market towns are one of the things that give East Cheshire its special character. Some, such as Nantwich or Knutsford, are already of significant established value to the visitor economy while others such as Congleton or Middlewich have potential to do so. Many of these towns have a distinctive heritage related to their rural hinterland, their connections to rail, road or canal and industries such as salt, silk or engineering. Promotion of these towns is being developed through i-visitor guides (www.cheshiremarkettowns.co.uk) where visitors can access a host of information that will inform their decision making of what to do and where to go. The i-visitor guides such as www.ivisitnantwich.co.uk will not only promote the towns themselves, but the attractions of the surrounding area, thus benefiting jobs and prosperity for the community.

'Telling the story' will be central to joining the various themes and opportunities. Matching reasons to visit with clear target markets will enable a clear focus to be developed that links quality of experience and the visitor offer. In many cases it is about adding value through linking existing assets and resources rather than creating new. Transforming the experience of visitors depends not only on getting the attractions and accommodation right, but through quality visitor information delivered where and when visitors need it, supporting the development of customer service skills across the area and taking an integrated approach to issues such as transport, signage, planning and licensing. The quality of the public realm, transport, the natural environment, rights of way, cultural activities and the built heritage are the foundations of a destination's distinctiveness of place and its authenticity.

Managing, enhancing and sustaining these to the highest standards will ensure that the region can offer high-quality and distinctive experiences to visitors.

Working together will be the key to delivery. Developing partnerships between public and private sectors will be essential if the true potential of the Cheshire East visitor economy is to be realised. Encouraging and supporting private sector investment must be at the heart of future approaches. The work of the Visitor Economy Forum, partnership delivery through the tourism board and the development of effective business clusters are also essential to its success. Working together will also help us to assess delivery, celebrate success and to benchmark achievements.

Cheshire East Visitor Economy: Spatial priorities & Strategic Brands

Economic spatial priorities: Crewe, Macclesfield, Market towns (Sustainable towns and rural areas).

Additional Visitor Economy potential business growth areas: Tatton/Knutsford/Jodrell, Nantwich & rural area, Macclesfield, Canal corridors, Cheshire Peak District.

Sub-regional Destination brands: Tatton Park, Jodrell Bank, Cheshire's Peak district.

Key campaign brands 2010: Gardens of Distinction, Cheshire Peak District, Taste Cheshire, Hoof Cheshire, Eventful escapes, Heritage/Historic properties.

Cheshire East Visitor Economy: Key market segment

Short breaks to Cheshire - 2 hr catchment for high spending Cosmopolitans and Traditionals building on current markets and converting days to stays.

Family market - from the higher spend target segments of Cosmopolitans and Traditional as a new support market for days and stays. This will be pre-school, year round and 5-12 year olds in school holidays.

Visiting friends and relatives - segments as above.

Day visitors - segments as above.

How do we do it?

Delivering Visitor Economy outcomes do not belong to one organisation or one Local Authority service. We need to align visitor activity with economic regeneration and the quality of life of our residents in order to deliver the quality destination that is vital. It therefore requires a corporate commitment to the quality of its Visitor Economy offer from Cheshire East Council and working through a partnership approach that involves both public and private sector, in order to succeed.

Opportunities can be explored to generate new sources of funding and to secure private sector investment. For example, additional investment support is currently available through 'Gardens of Distinction' marketing (European Regional Development Fund), two projects under the Rural Development Programme For England (RDPE); Tourism Connect, improving accommodation standards and Tourism Vitality, for attractions and events and through the Council's own 'Recession Recovery' projects.

The commitment to working together through partnerships is explicit within Cheshire East. However



Jodrell and Tatton

A new Discovery Centre is being planned for the University of Manchester's Jodrell Bank. The project, which they hope will be phase 1 of a larger development a 'Planet Pavilion', new café, exhibition/events, space a 'Galaxy maze' and extension of the arboretum. Jodrell Bank already has a high profile with visitors and the proposed developments are aimed at growing the visiting audience. Nearby, Tatton Park is investigating the potential of growing the family market with a new attraction that would help to boost visitor numbers from 800,000 to 1 million. Combined or separately, investment at these attractions would significantly boost the overall contribution to the local economy. Their proximity to each other and the wider offer in the immediate locality have the potential to create a tourism 'hot spot'.

the geography of the area dictates that, while partnership working across Cheshire & Warrington is important, we also need to work with neighbouring destinations such as Manchester, the Peak District, Staffordshire moorlands and North Shropshire as the visitor does not recognise political boundaries in the search for a quality destination. Working together must also extend to a joined up approach to the relationship of tourism to heritage, sport, arts, culture and the creative industries.

Cheshire East Council, through delivery of services related to planning, transport, regeneration and public realm can support and facilitate appropriate private sector investment in the Visitor Economy as well as sustaining existing levels of business. Correspondingly, Visitor Economy has an important role to play as part of the areas place marketing, thereby enhancing economic and job opportunities and encouraging inward investment. There is therefore a need to consider Visitor Economy needs and opportunities as part of policy and decision making within the Council's wider service delivery to the benefit of the economy, jobs and the resident community.

The approach to working together should be about making best use of resources to 'join the dots' and to add value together to what could be achieved separately.



Key Priorities

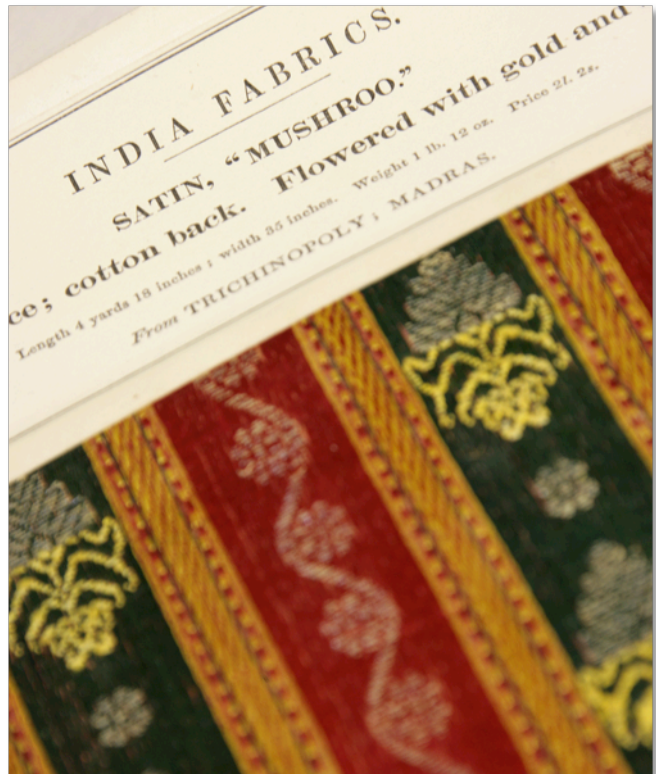
The following priorities have been identified for the period up to 2015:

- A Visitor Economy Forum for Cheshire East to provide an opportunity to develop partnership working and discussion with representative bodies.
- Completion of Tatton Visioning leading to product development.
- Continued support for Jodrell Bank redevelopment and other key investment projects.
- Encourage investment in quality tourism product and services in Cheshire East to the benefit of jobs and economic growth.
- Development of and support for an events strategy at sub-regional and Cheshire East levels to maximise the potential benefits of strategic events to the Visitor Economy and of local cultural activity to the distinctiveness of the area, especially in the lead up to the 2012 Games.
- Development of approaches to transform the experience of visitors through quality visitor information, supporting the development of customer service and other sector skills and seeking an integrated approach to issues such as transport, signage, planning and licensing.
- Development of a sub-regional focus on business tourism through a clustering approach, close working with businesses, development of bespoke products and/or focus on specific business, association or celebration markets taking account of the specific needs of Cheshire East.
- Continuation of ICT and digital developments to enhance the offer and assist communication, including a coordinated and integrated approach to 'i-visitor guide' and 'Discover...' web platforms.
- Continued support for 'Cheshire's Gardens of Distinction' as gardens are already a major visitor attraction and a high proportion are within Cheshire East.
- Adoption and development of Cheshire's Peak District and related thematic brands to communicate and reinforce the countryside experience
- Promotion of access to our countryside and of our waterways networks in coordination with strategic developments through such as the Rights of Way Improvement Plan, Local Area Partnerships, links with market towns and associated strategic plans.
- Development of partnership working and delivery through a Visitor Economy forum, cluster working and 'hub' offices at Tatton Park and Reaseheath encourage and facilitate development of the Visitor Economy.
- Review of visitor information provision and testing of new approaches
- Incorporation of Visitor Economy issues and opportunities within regeneration projects such as Crewe Vision, Middlewich Town Wharf and Macclesfield Economic Master Plan within targeted regeneration around a 'sustainable towns' agenda, for Market Towns, exploitation of heritage assets and through effective place marketing.
- Ensure that Visitor Economy needs and opportunities are taken into account as part of decisions relating to matters such as planning, transport, public realm, events, culture and countryside/greenspace.

Measuring success

It is essential to the success of any strategy that effective research and intelligence is available to review success and to inform future decisions. This is most effectively delivered sub-regionally, but the distinctive requirements of Cheshire East must be identified and built in to future research and monitoring plans. There also needs to be good communication between Visit Chester and Cheshire and the Local authority's own research capacity to ensure effective targeting of resources. Further research may be required in order to assist decisions about market potential and development opportunities as well as provision of benchmarking data.

At present there are few effective measures other than STEAM data to monitor the Visitor Economy and few measures that are relevant to sectoral support in Cheshire East (e.g. hotel data), though it is hoped that the Local Economic assessment may provide a means of supporting a robust evidence base in the future. However, this is not a unique issue across the region and it requires both a strategic level of support and the effective cooperation of local business. The direction and speed to be followed in achieving the Visitor Economy priorities will be guided through the Visitor Economy Forum, which will also inform Cheshire East's contribution to the annually reviewed Destination Management Plan for Cheshire and Warrington. To work effectively the forum will need access to good market research and monitoring of key indicators. New indicators may have to be considered in order to target resources effectively.



The key outcome targets we seek to achieve by 2015 are:

- **Develop a Visitor Economy with a value of £818m by 2015**
- **Increase jobs directly related to the Visitor Economy by around 1271 over the same period**
- **Increase visitor numbers to Tatton to 1m by 2015**
- **Increase the number of businesses achieving quality accreditation.**

Conclusion

The Visitor Economy Strategy is a strategically important component of the Council's economic development priorities. It is an important contributor to the economy of Cheshire East, contributing to local quality of life, and has a positive impact on decisions over business location and individual choices over where to live and work. The strategic framework outlines some of the issues and priorities that the Council must consider and resource, the opportunities to align the needs of residents and visitors and a model for partnership working to help realise the potential of Visitor Economy in Cheshire East.

Appendix 1: Strategic framework summary

Create the new experience		b). Creating the offer
Telling our stories	Transforming the experience	Attracting visitors
Incorporate tourism branding into all relevant interpretation, promotion and place marketing.	Review and develop visitor information services that match visitor needs.	Support a marketing strategy to focus on specific markets making best use of geographic or thematic brands with the objective of growing visitor income.
Prioritise support for projects that support and reinforce key brands and themes.	Create more opportunities to spend.	Support investment in attractions and assets, with priority development of key projects.
Encourage businesses to celebrate their stories and adopt the relevant tourism branding.	Exploit the potential of food, drink and local products to enhance the experience.	Develop & support key geographic / thematic brands.
Use web and digital media to extend the reach of brands, messages and new product offers.	Foster high growth, high quality businesses.	Identify and celebrate the distinctive visitor offer of our countryside, towns, villages harnessing potential to add value to the visitor economy.
Develop a visitor welcome training and support programme.	Build visitor needs into decision making on public realm, access, transport, planning, town centre management and other such matters.	Develop and promote an events programme that supports brands/themes raises profile and quality and helps to extend the season.
Create immediate impact at major gateways.	Demonstrate commitment to taking care of a high quality environment.	Focus on business tourism.
		Build on Cheshire East's image, profile and local pride.
Working together		
Work in partnership with Visit Chester and Cheshire and others to deliver improvements in the Visitor Economy of Cheshire East.		
Work with partners on advocacy, influence, insight, market growth and development and to monitor progress.		
Recognise the role of local authorities in creating quality places for residents and visitors & help to create an environment that encourages entrepreneurs and developers.		
Work with tourism business clusters to help make most effective use of resources and business engagement.		
Ensure that the delivery of the strategy is monitored and success communicated.		

Create the new experience

Telling our stories

Incorporate tourism branding into all relevant interpretation, promotion and place marketing.

Communicate and liaise with all relevant partners, including within Cheshire East Council, to ensure tourism branding is appropriately and consistently incorporated.

Prioritise support for projects that support and reinforce key brands and themes.

Identify, assess and support key projects eg Jodrell Bank, Tatton Park and opportunities stemming from areas such as market towns, regeneration priorities or externally funded programmes (eg ERDF or RDPE).

Encourage businesses to celebrate their stories and adopt the relevant tourism branding.

Work with recognised tourism businesses to provide relevant brand guidelines and support as well as encouraging businesses to work in partnership to identify or exploit PR opportunities.

Use web and digital media to extend the reach of brands, messages and new product offers.

In partnership with stakeholders seek develop online and digital resources to support and communicate brands and product, provide cost-effective targeted communication and new opportunities to develop the visitor experience and their access to products. In conjunction with VCC ensure that i-visitors guides and 'Discover' sites are maintained, developed, integrated and supported.

Develop a visitor welcome training and support programme.

Through VCC seek to develop and roll out a 'Cheshire Welcome' training and support programme.

Create immediate impact at major gateways.

Identify key gateways and in partnership with stakeholders seek to improve relevant visitor economy messaging/branding.

Creating the new experience

Creating the offer

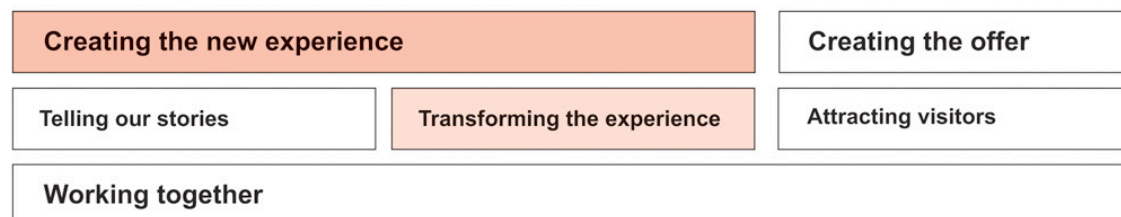
Telling our stories

Transforming the experience

Attracting visitors

Working together

Create the new experience	
Transforming the experience	
Review and develop visitor information services that match visitor needs.	With support from VCC, review visitor information services including the opportunity to develop or pilot new approaches to developing sustainable and transferable solutions and implement necessary change.
Create more opportunities to spend.	Work with tourism clusters to encourage them to package opportunities (eg accommodation working with attractions and retail) and identify through VCC support for business tourism packages.
Exploit the potential of food, drink and local products to enhance the experience.	Support and seek to extend 'Taste Cheshire. Work with partners to encourage use of local/regional produce and develop the consumer focus through events or visitor attraction/accommodation food offerings.
Foster high growth, high quality businesses.	Through Economic Development strategies and support, planning, transport etc, encourage relevant visitor economy businesses with growth potential. Encourage and support take-up of RDPE funding to 2013: Tourism Connect aims to improve accommodation standards and Tourism Vitality offers grants towards improving tourist attractions and events.
Build visitor needs into decision making on public realm, access, transport, planning, town centre management and other such matters.	Identify and ensure visitor economy needs/opportunities are represented within projects (eg sustainable towns, Crewe Vision, Macclesfield Town, Middlewich, LTP etc) and delivery plans.
Demonstrate commitment to taking care of a high quality environment.	Recognise the value of quality green space, rights of way, countryside environment heritage, town centres and public realm to the visitor economy through relevant strategies, projects and plans.



b). Creating the offer

Attracting visitors

Support a marketing strategy to focus on specific markets making best use of geographic or thematic brands with the objective of growing visitor income.

Help collate available research and identify markets relevant to key brands and themes. With VCC and businesses, develop promotional and marketing strategies to effectively exploit these markets and encourage product development that supports or fills gaps in the market.

Support investment in attractions and assets, including priority development of key projects .

Encourage and support relevant investment opportunities in attractions and tourism assets and ensure VE objectives are part of forward planning for key projects (eg Tatton Park, Jodrell Bank).

Develop & support key geographic/thematic brands.

Support the development and application of key brands of particular relevance to Cheshire East; Cheshire's Peak District, Gardens of Distinction and Taste Cheshire as well as supporting thematic activity around heritage, waterways, market towns or other emerging areas, providing assistance to business clusters as appropriate.

Identify and celebrate the distinctive visitor offer of our countryside, towns and villages, harnessing potential to add value to the visitor economy.

Promote and cross-promote the assets of towns and countryside areas of value to the visitor economy, seek opportunities for positive PR, encourage areas of potential and add value through the development of geographic or thematic brands where relevant.

Develop, encourage and promote an events & festivals programme that supports brands/themes raises profile and quality and helps to extend the season.

Promote and support the development of strategic events to achieve quality, sustainability and a good visitor experience. Help to identify and nurture new and innovative events in Cheshire East that have visitor economy potential, particularly where of sub-regional or above value. Tourism Vitality offers grants towards improving tourist attractions and events in the area (RDPE funding until 2013).

Focuses on business tourism.

Work with VCC to devise and implement a business tourism strategy relevant to the markets and assets of Cheshire East to maximise business and corporate spend.

Build on Cheshire East's image, profile and local pride.

Manage, sustain and enhance public realm and services used by visitors to the highest standards possible to achieve a high quality distinctive offer that benefits visitors and residents alike. Encourage projects that promote community pride and engagement in place and environment. Take opportunities to raise the profile of and promote a positive image of Cheshire East.

Creating the new experience

Creating the offer

Telling our stories

Transforming the experience

Attracting visitors

Working together

Working together

Work in partnership with Visit Chester and Cheshire to deliver improvements in the Visitor Economy of Cheshire East.

Develop visitor economy delivery 'hub's' at Tatton Park and Reaseheath to combine resource and effort for shared objectives in line with the Cheshire East Visitor Economy Framework, and work together in a strategic partnership.

Work with partners on advocacy, influence, insight, market growth and development and to monitor progress.

Develop a strategic approach and partnership working through the Visitor Economy Forum as well as sub-regional or cross-boundary bodies.

Recognise the role of local authorities in creating quality places for residents and visitors & help to create an environment that encourages entrepreneurs and developers.

Ensure the visitor economy interests are incorporating in the Council's relevant strategies and delivery plans, with particular regard to Economic development, Transport, Planning, Health and Wellbeing and Customer services.

Work with tourism business clusters to help make most effective use of resources and business engagement.

Encourage and support tourism business clusters to deliver added value and as routes to improving product quality, promotion, communication and stakeholder engagement.

Ensure that the delivery of the strategy is monitored and success communicated.

Encourage sharing of visitor economy research capacity and data, build monitoring mechanisms into activities undertaken and work with partners/stakeholders to develop effective routes to identify and promote success.

Creating the new experience

Creating the offer

Telling our stories

Transforming the experience

Attracting visitors

Working together

Appendix 2: Cheshire East summary of available research

Volume and Value – Visitor Economy Overview

- The Cheshire Visitor Economy is worth £1.78bn with east Cheshire contributing £653m. (STEAM 2008).
- Day visitors accounted for 67% of all tourism spend in east Cheshire during 2008. (STEAM 2008)
- It is estimated that east Cheshire had 16.7m visitors in 2008. (STEAM 2008).
- In terms of tourism employment as a % of the population, Cheshire East is slightly below the Northwest average of 3.2%, at 2.9%. (TEAM Analysis, 2009)
- Cheshire accounts for 8% of the region's accommodation establishments.
- East Cheshire accounts for more tourists (40%) than any other part of the sub-region. (STEAM 2008).
- Known Bed stock in east Cheshire: 8104, which equates to 35% of the sub-regional total.
- The two biggest sectors in terms of expenditure are food & drink and shopping, accounting for 39% of all expenditure in east Cheshire. This is an increase of 1.5% from 2007 to 2008. (STEAM 2008)
- The three biggest sectors in terms of employment are food & drink, accommodation and shopping, accounting for 64% of all Visitor Economy employment in east Cheshire. Overall there was a 4% increase Visitor Economy employment from 2007 to 2008. (STEAM 2008)
- Visitors staying in paid for accommodation within east Cheshire accounted for 5% of the total visitor numbers, with the vast majority of visitors (91%) being day visitors. (STEAM 2008)

Image and Perceptions (data supplied from NW Stay and Day Visitor Survey, 2008)

- Rural Cheshire has stronger appeal to 'independent' market segments – especially traditionalists and cosmopolitans.
- Rural Cheshire has relatively low appeal among other rural destinations with only 33% considering rural Cheshire as a short-break destination.

Staying and Day Visitors (Destination Report, TEAM, 2009)

- Spend by both day (£36) and staying (£23) visitors in Cheshire (outside Chester) was slightly below the NW average.
- Cheshire's largest markets (both days and staying) are **Cosmopolitans** and **High Streets** – this is in line with the region. Among staying visitors it is attracting higher than average proportions of **Traditionalists**.
- The **age** profile of staying visitors to Cheshire is broadly similar to that of the region but skewed slightly to 55+ visitors, and less to 16 – 34s.
- Staying visitors to rural Cheshire are more likely to be 55+, with no children at home.
- Other important staying visitor markets are the Northwest and the West Midlands. The East Midlands and East of England are also important for rural Cheshire
- Staying trips to rural Cheshire is 2 nights.
- Average length of stay is lower than the regional average – with significantly lower proportions staying 4+ nights.

Business Tourism (VCC Figures 2010)

- £3.7m of business tourism delegate economic benefit was secured by Visit Chester & Cheshire during the 2009/2010 financial year. Forecasts for 2010/2011 shows show that over £2million in delegate economic benefit has already been secured. This is forecast to increase as the year progresses.

Useful Consumer Insights – East Cheshire

MOSIAC profiling consumer datasets supplied by VCC show a number of clear conclusions with regards to which our current target markets are. These are Production Managers, Innate Conservatives and Yesterdays Captains.

Gardens Insights from the 2008 Evaluation from the onsite survey

- The majority of respondents (54%) were from Cheshire. However, festivals were also successful in attracting audiences from further a field, with 29% coming from elsewhere in the North West and 16% travelling from elsewhere in the UK.
- **Attitudes to Cheshire** - Overseas respondents were most likely to indicate “good food” as a priority for a day out; they were also most likely to „appreciate beauty and craftsmanship” and were the most likely group to indicate that they were interested in using public transport for leisure purposes.
- Respondents based Elsewhere in the UK were the least likely to indicate that Cheshire was famous for its gardens” and that it had „a clear image”. Also, along with other domestic visitors they had a lower interest in using public transport.
- Cheshire Residents were most likely to agree that the area was, losing its gloss” (CGOD Marketing Research, Nov 08).

Textile Festival Evaluation (September 2009)

- The main reason for visiting was to attend the event (41%) followed by those visiting the area/attraction already (36%).
- The majority were day visitors (57%), with a quarter staying overnight.

Cheshire Peak District (QA Research - February 2009)

- 39% of consumers have visited/heard of Cheshire’s Peak District (consumer base 497)
- When compared against the Peak District the ‘offer’ was viewed as very similar in many ways, key differences being: - historic houses to visit, gentle countryside, many gardens to visit, opportunity to visit lots of industrial heritage
- 98% of stakeholders could place the area on a map, although nearly two thirds thought it was bigger an area than it is

East Cheshire Attractions

- The total footfall at attractions in east Cheshire during 2007 was 1.6 million visitors.
- The largest attraction within east Cheshire was Tatton Park, with 808,000 visits during 2007/08.
- The annual economic output of Tatton Park is £21.5m gross; £8.8m net. (SQW 2006)