



**Joint Special Meeting of the
Environment and Sustainable Communities Overview and
Scrutiny Committee
and the
Economy and Enterprise Overview and Scrutiny Committee**

Date **Friday 14 April 2023**
Time **9.30 am**
Venue **Council Chamber, County Hall, Durham**

Business

Part A

**Items which are open to the public and press.
Members of the public can ask questions with the Chair's
agreement and if registered to speak.**

1. Apologies
2. Substitute Members
3. Declarations of Interest
4. Any items from Co-opted Members or other Interested Parties
5. County Durham's Visitor Economy - Overview
 - a) Report of the Corporate Director of Regeneration, Economy and Growth (Pages 3 - 16)
 - b) Presentation by the Head of Culture, Sport and Tourism (Pages 17 - 48)
6. Such other business as, in the opinion of the Chair of the meeting, is of sufficient urgency to warrant consideration

Helen Lynch
Head of Legal and Democratic Services

County Hall
Durham
4 April 2023

To: **The Members of the Environment and Sustainable Communities Overview and Scrutiny Committee**

Councillor B Coult (Chair)
Councillor J Elmer (Vice-Chair)

Councillors E Adam, P Atkinson, L Brown, J Charlton, L Fenwick, G Hutchinson, C Kay, C Lines, B McAloon, I McLean, R Manchester, C Martin, D Nicholls, R Potts, J Purvis, J Quinn, T Stubbs, D Sutton-Lloyd and S Townsend

Co-opted Members

Mr T Cramond and Mr P Walton

The Members of the Economy and Enterprise Overview and Scrutiny Committee

Councillor K Robson (Chair)
Councillor A Jackson (Vice-chair)

Councillors M Abley, A Batey, G Binney, K Earley, D Haney, G Hutchinson, C Lines, L Maddison, R Manchester, C Marshall, C Martin, J Miller, B Moist, R Ormerod, A Reed, I Roberts, A Sterling, A Surtees and S Wilson

Co-opted Members

Mrs R Morris and Mr E Simons

Contact: Jill Hogg

Tel: 03000 269711



Joint Special Meeting of Environment and Sustainable Communities Overview and Scrutiny Committee and Economy and Enterprise Overview and Scrutiny Committee

14 April 2023

County Durham's Visitor Economy

Report of Amy Harhoff, Corporate Director of Regeneration, Economy and Growth

Electoral division(s) affected:

Countywide

Purpose of the Report

- 1 To provide members with an overview of tourism/visitor economy and cultural services in the county council and to outline future opportunities.
- 2 To present the County Durham visitor survey for 2022.

Executive Summary

- 3 The visitor economy is a major economic driver for County Durham:
 - 15.77 million people visited in 2021, up 38.5% on 2020
 - Overall visitor expenditure was £826.68 million, up by 63.1% on 2020
 - The number of FTE jobs supported by tourism is 10,063, up by 48.1% on 2020
- 4 The cultural offer is an integral part of the visitor economy and drives a large number of visits; for example, Beamish Museum was the most visited attraction in the North East region in 2022, welcoming 774,000 people.
- 5 Durham County Council directly delivers or supports a significant proportion of the cultural offer in the county, including venues, festivals, events, and community arts programmes.

- 6 As the visitor and cultural economy are moving into post-pandemic mode, there are a number of significant strategic opportunities including:
- National and regional strategic policy developments on the visitor and cultural and creative economy, which benefit county Durham, including the DuBois review of destination management organisations, the proposed north-east devolution deal, the BBC's Across England strategy, and Arts Council England's Priority Places scheme.
 - The increased ambition and confidence of the cultural sector in county Durham, in part as a result of the shortlisted City of Culture bid, which directly provided media coverage with a value of £8 million.
 - The post-covid interest in outdoor activity, nature and the environment.
 - The launch of the County Durham Inclusive Economic strategy, and the embedded role of the visitor economy and culture in the long-term success of the county and the wider region.
 - The development of a new Destination management plan for the county.
- 7 Taking the current evidence and short- and medium-term opportunities into account the outlook is positive. However, it requires a strategic and approach to partnership and development both internally and externally, to maximise recovery and growth.

Recommendation

- 8 Members of the Economy and Enterprise Overview and Scrutiny Committee are asked to note and comment upon the information provided in the report and during the presentation.

Background

- 9 Visit County Durham is the destination management organisation (DMO) for County Durham working on behalf of businesses and public agencies.
- 10 The operating model is that of a destination management organisation within a local authority: delivering destination management, destination marketing and place marketing functions.

- 11 Visit County Durham Ltd is a separate not-for-profit company limited by guarantee with a public/private board of 12 directors. Durham County Council has two places on the board, these are filled by the Director for Regeneration, Economy and Growth, and the Portfolio Holder for Economy and Partnerships.
- 12 The Visit County Durham team are part of the Culture, Sport and Tourism Service of Durham County Council within Regeneration, Economy and Growth.
- 13 In 2021 the DCMS-commissioned DuBois review examined and assessed how Destination Management Organisations (DMOs) across England are funded and structured, and how they perform their roles, in order to establish whether there may be a more efficient and effective model for supporting English tourism at a regional level, and, if so, what that model may be.
- 14 In July 2022 the UK Government published its response to the Dubois review, agreeing that while Destination Management Organisations are a vital part of England's tourism landscape, it is necessary to reshape the DMO landscape at a local and regional level to maximise the visitor economy.
- 15 As a result, the Department for Digital, Culture, Media & Sport (DCMS) announced that it will provide £4 million over the next three years for VisitEngland to:
 - Develop and administer a new accreditation scheme for strategic DMO's that will see them become Local Visitor Economy Partnerships (LVEP)
 - Pilot a 'top tier partnership' of accredited LVEP's through a 'Destination Development Partnership'.
- 16 Visit County Durham, NewcastleGateshead Initiative (NGI) and Visit Northumberland were the first in the country to apply and test the accreditation process and are all now officially recognised by VisitEngland as LVEPs.
- 17 In November 2022 DCMS announced that the North East region (LA7 area) had been selected for the new Destination Development Partnership (DDP) pilot, with NGI as the accountable body.
- 18 Funded with £2.25 million (£750k pa over three years), the aim of the pilot is to develop new initiatives to attract visitors and attract investment into the visitor economy. As the selected region, we will act as a potential blueprint for the rest of England and help shape the future landscape of destination management organisations, delivering local

economic growth through the visitor economy across all seven local authorities.

- 19 The pilot presents an opportunity to unlock both the county and regional visitor economy potential, attracting more visitors, creating new experiences, targeting new markets as well as creating jobs and opportunity.
- 20 This £2.25m funding is granted to supplement regional spend, not to replace and cannot be used on marketing but on developing the regional tourism eco-system including:
 - Skills co-ordination
 - Sectoral business support
 - Accessibility best practice
 - Sustainability support
 - Business events development
 - Product development

Culture, heritage and landscape

- 21 The culture and heritage offer in County Durham is a powerful asset that drives the visitor economy, and its clear that its role can have even greater impact on the wider economic success of the area.
- 22 A recent mapping of culture, heritage and landscape-based venues and attractions (appendix 2) reveals a substantial infrastructure and highlights further the importance of culture and heritage to the visitor and to the local economy.
- 23 As part of Arts Council England's delivery plan the national funding body identified 54 places across England in which their investment and engagement is too low and the opportunity to increase investment and engagement is high – and it will prioritise activity in these places.
- 24 County Durham is one of the priority places and there is some evidence that this is supporting increased investment including a 37% increase to funding to organisations in county Durham through the NPO core funding programme, and one of the largest MEND fund awards in the country to Bowes Museum at £974,000.
- 25 This follows County Durham's remarkable progression to the final shortlist of four in the UK City of Culture competition and the developing plans to deliver as much of the ambitious City of Culture programme as possible.

- 26 The bid built on existing strength in festivals and events in the county, including private sector and independent delivery.
- 27 The annual festival portfolio managed by DCC covers BRASS, Durham Book Festival, Bishop Auckland Food Festival, Seaham Food Festival and Lumiere, the UK's largest light festival, takes place every 2 years. In excess of 250,000 people attend the festivals.
- 28 Regular evaluation shows sustained public backing for each festival (between 95%-99% of respondents feel it's a worthwhile event for the council to support) as well as social and economic return on investment, with Lumiere providing £3.4 million economic benefit and 70% of visitors to BRASS stating that it had a very positive impact on their health and wellbeing.
- 29 New events such as The Bright Ideas Gathering, County Durham's answer to the TED conference, and emerging plans for the celebration of the bicentenary of the Stockton and Darlington railway in September 2025 and other city of culture legacy events will further develop the festival and event portfolio.
- 30 Durham County Council is one of a relatively small number of local authorities that directly manage theatre provision and so has responsibility for a significant part of the venue-based performing arts provision in the county. The council manages Gala in Durham, The Empire in Consett and Bishop Auckland town Hall as a studio space.
- 31 Following a new approach to our theatre provision, we have increased the proportion of our own productions or co-productions in the venues. This has a number of advantages including the ability to cast or commission local actors, writers & directors; supporting local suppliers; ensuring work is relevant to our audiences; and greater confidence in income forecasts. It has additional reputation benefits in the cultural sector and beyond, building Durham's profile as a place for creativity and talent.
- 32 This approach has been very successful in 22/23, exemplified by our in-house production of Brassed Off which played to full houses, met its financial targets, employed local brass band players, gave opportunities to a community cast and new regional talent.
- 33 In addition to Brassed Off, the in-house team has produced or co-produced an outdoor show that toured to parks across the county in summer 2022 and 2 Christmas productions. An audience of over 40,000 have experienced this work. All productions have met their targets and are putting County Durham on the cultural map.

- 34 We have similarly taken a new approach in our cinema at Gala introducing 'event cinema' where film, food and drink combine to create a more vibrant night out. We have built a closer relationship with our audience through social media and direct engagement so that film programming is more aligned to what we know people want. For example, the film programme for Pride Week was advised by a LGBTQ+ staff group.
- 35 The average income per screening has more than doubled during December 2022 and March 2023 compared to the same period in the previous year.
- 36 Our museums and heritage buildings are important to both residents and visitors, and we're committed to developing new ways of working to attract more visitors and improve the quality of experience.
- 37 At Killhope Lead Mining Museum the café offer and facilities for walkers and cyclists have been improved, recognising that the location and setting of the museum is as important as its exhibitions and events. This has resulted in an overall increase in visitors and a doubling of catering income.
- 38 New developments in Durham City, including The Story, the refurbished DLI Museum and art gallery and refurbishment of Redhills as a culture and education facility, bring significant opportunity to increase the cultural tourism offer in the city centre.
- 39 The regional Northern Saints Group, led by Visit County Durham, created linked long-distance trails based on the heritage of the Northern saints and the tradition of pilgrimage. The Northern Saints Trails, based on ancient pilgrim routes, position the North East as the 'Christian Crossroads of the British Isles' and bring the fascinating stories of the region's saints to life, set against a backdrop of the very best of the region's attractions, landscapes, places to eat.
- 40 Since launch and opening of the routes taking place in September 2021, NST has supported the creation of 64 FTE jobs and provides annual economic benefit of £4.3 million.
- 41 Exploring our natural landscape is a positive way to support health & wellbeing and the environment, as well as the visitor economy and we continue discussions neighbouring areas about linked trails, and with partners such as North Pennines AONB on their plans to develop access to the landscape through new campaigns and products.

Destination Management Plan

- 42 The destination management plan converts local, regional, and national market research and strategies into a county-based plan to grow the county's visitor economy. The plan is for all organisations and individuals in Durham, and, where relevant, national bodies to help them understand what is being done, what needs to be done and how they can contribute to Durham's success.
- 43 The objective is to ensure that the tourism sector performs to its maximum capacity and brings economic benefits to the county and its residents in the form of wealth and job creation.
- 44 The current plan has 8 key aims:
- Lengthen the amount of time that visitors spend in the county
 - Improve the quality of the visitor experience post arrival
 - Differentiate Durham for external audiences
 - Attract new staying visitors to the county
 - Retain existing day visitors to the county
 - Address seasonality
 - Develop new product and support existing product strengths
 - Improve SME and micro business performance
- 45 The 2023-2026 destination development plan is undergoing development and consultation with stakeholders currently, and is expected to be built on 5 key pillars:
- County Durham provides an end-to-end experience which is high quality welcoming and inclusive
 - County Durham is better promoted with a compelling narrative for external audiences
 - County Durham offers extended season products and experiences
 - County Durham offers eye-catching authentic product that meets the needs of consumers
 - County Durham's business are supported to develop performance resilience and profit

- 46 The plan will be aligned to and embedded within the aims of County Durham's first inclusive economic strategy.

Inclusive Economic Strategy

- 47 The Inclusive Economic strategy was adopted by the council in December 2022. It seeks to overcome barriers to transform levels of growth and harness the county's potential, with all partners actively working towards this shared vision.
- 48 The strategy has been informed by feedback from residents, businesses and young people gathered during the Big Econ-versation, an extensive stakeholder engagement process which took place between February and April 2022.
- 49 Evidence shows that the visitor economy is a vital part of the county's wider economy, and resident and business feedback showed a strong commitment to maximising our cultural and heritage assets to support pride in place as well as supporting a stronger and more resilient economy.
- 50 Tourism and culture are embedded in the 'promotion' strand of the inclusive economic strategy, with the aim to promote our county, assets and opportunities to businesses, investors, visitors, developers, and residents.
- 51 Key priorities include the development of a clear brand and place marketing, to attract more inward investment in relevant sectors and places, to grow a year-round visitor economy, and to enhance cultural and creative infrastructure.
- 52 Work is underway to develop the detailed delivery plans that will underpin the strategy and will be adopted later this year.

Performance

- 53 Market intelligence is essential to accurately inform and shape our work, providing relevant information and insight to help the county's tourism sector to prosper and grow.
- 54 One of the main pieces of research undertaken is the annual economic impact assessment STEAM, which approaches the measurement of tourism from the bottom up, through its use of local supply side data along with tourism performance and visitor survey data collection.

55 The indexed STEAM results from 2015 to 2020 show steady year on year growth for the visitor economy. In 2020 the sector retracted and was badly affected by the COVID-19 pandemic, and 2021 is a recovery year and continued to be affected by the pandemic. This is in line with national trends. The 2022 data is expected to show continued growth to pre-pandemic levels.

	2015	2016	2017	2018	2019	2020	2021
Expenditure (£ m)	885.21	904.63	948.65	962.19	980.72	506.75	826.68
Visitor numbers (m)	18.67	19.25	19.71	19.71	20.13	11.39	15.77
Employment (FTEs)	10,966	11,158	11,682	11,998	12,133	6,794	10,063

Visitor survey

56 During the summer of 2022, 1200 face to face CAPI surveys were undertaken with visitors to Durham. The surveys were conducted by Market Research Society accredited researchers on e-tablets gathering a mixture of quantitative and qualitative data.

Key objectives of the interviews were to:

- 57 Gather data on visitor profiles such as demographics, group composition, and distribution of overnight and day visitors.
- 58 Understand:
- (a) where people go to find information about events and things to do in Durham.
 - (b) key drivers of visits to the area.
 - (c) how visitors move around the destination
 - (d) awareness levels of the visitor offer in Durham
 - (e) visitor experience and identify areas for improvement
 - (f) the average spend of day visitors and overnight visitors
 - (g) dwell time for day visitors and average length of stay for overnight visitors.

- 59 Durham has a vibrant visitor economy with 15.77 million visitors in 2021. Using this as a base, a sample of 1200 respondents ensures we can be 95% confident that the data at an overall level has a variance of no more than +/-5% accuracy.
- 60 The key results are featured in the PowerPoint presentation at appendix 3.

Marketing

- 61 VCD takes an integrated marketing approach that provides seamless communication with the consumer from the earliest planning stage, to when they visit the county and that continues when they return home.
- 62 thisisdurham.com and its channel sites is our main on-line fulfilment tool. It is viewed by more than 1 million unique visitors (individuals) a year and offers inspiration and information to potential visitors.
- 63 This year we have expanded the site to support 2 new markets
- the business and association conferencing market with 'Meet in Durham' which aggregates and signposts to the unique and bespoke conferencing facilities across the county,
 - Film Friendly Durham highlights the county locations that feature in iconic films and well-loved dramas such as Harry Potter and Vera, building on the growing market for 'Set Jetting' or screen-based tourism
- 64 We achieve greater marketing reach in the domestic market through partnership working with the county's tourism industry, regional and commercial partners, and Visit England. We take a considered, data driven approach to international marketing working with VisitEngland, VisitBritain and consortia to deliver activity to a small number of territories.
- 65 The main areas of work are content management to regularly refresh the destination offer optimisation and paid search to ensure traffic volume increases to ensure the site is current and functional, and the development of campaign channel sites to support tactical marketing work.
- 66 We create and distribute destination content for third parties to use in their marketing work including national marketing bodies (VisitEngland), intermediaries (travel trade), events with visitor appeal (Lumiere) and points of entry (airports).

- 67 e-direct marketing is designed to create and maintain direct relationships with existing and potential visitors and involves managing large consumer databases and sending tailored and targeted communications to individuals.
- 68 VCD undertakes marketing for key county events and festivals because they are conceived and delivered as destination events that will attract visitors. This allows us to ensure the destination is profiled through event promotion. This will be further developed under 'The Culture County' banner.

Conclusion

- 69 The culture and tourism functions of the council are substantial and provide significant benefits for residents, visitors, businesses and partners. The functions interconnect across all council departments and with external partners at a local, regional, national and international level. They are key to our sense of place, local pride and national profile and reputation.

Contact:

Alison Clark alison.clark@durham.gov.uk

Appendix 1: Implications

Legal Implications

None.

Finance

None.

Consultation

None.

Equality and Diversity / Public Sector Equality Duty

None.

Human Rights

None.

Climate Change

None.

Crime and Disorder

None.

Staffing

None.

Accommodation

None.

Risk

None.

Procurement

None.

	Categories	Short Description	Capacity ¹
Apollo Pavilion	Viewpoint, Public Art	An iconic example of 1960s public art and designed by Edwin John Victor Pasmore (d. 1998) during his time as consultant Director of urban design for Peterlee Development Corporation.	Small
Auckland Castle Deer House and Park	Park, Historic Site, Nature Trail	Auckland Castle commands a prominent position overlooking the River Wear, surrounded by formal gardens and 150 acres of idyllic parkland.	Large
Barnard Castle	Historic Site, Castle / Fort	A spectacular fortress set on a high rock above the market town, Barnard Castle takes you back to the 12th century.	Medium
Beamish - The Living Museum of the North	Industrial Archaeology, Museum, Railway	Discover an amazing journey through time at Beamish Museum as you travel back in time and become immersed in real, living history.	Large
Binchester Roman Fort	Castle / Fort, Historic Site	Remains of Commandant's house and neighbouring bath-house containing one of the best preserved examples of a hypocaust (underfloor heating system) in the whole of Britain.	Medium
Bishop Auckland Town Hall	Gallery, Arts Centre, Theatre	A multi-purpose cultural venue with art exhibitions, live music, theatre and films as well as a café and library with free internet access and local history information.	Medium
Chester-le-Street Riverside Park	Adventure Park / Playground	Created in the 1930s, Riverside Park has always been popular with visitors. It was redeveloped in the 1990s and now includes ornamental gardens, an events arena, play area and a park centre.	Large
Civic Hall Stanley and Alun Armstrong Theatre	Arts Centre, Cinema, Theatre	A vibrant Arts Centre, providing a range of music, live theatre and comedy. Also features a gallery, rehearsal facilities and meeting rooms.	Medium
Durham Castle	Castle / Fort, Historic House	Discover a castle that gradually turned into a lavish palace, which was affected by major historical events from the Norman Conquest to the English Civil War. home of University College, the founding college of Durham University.	Large
Durham Cathedral and Cathedral museum	Cathedral / Minister, Church / Chapel, Landmark	Built in 1093 to house the Shrine of St Cuthbert, Durham Cathedral is renowned for its magnificent Romanesque architecture and spectacular location at the heart of the Durham World Heritage Site.	Large
Durham Cricket	Sports Ground, Event Venue,	Emirates Riverside is a world class sporting and events venue which regularly attracts visitors from all over the world.	Large
Durham University Botanic Garden	Botanic Garden, Garden	Set in countryside and mature woodland. Plant collections from North America, Himalayas and China, glasshouse rainforest and desert plants. Six Colin Wilbourne sculptures in landscaped garden.	Large
Durham University Oriental Museum	Museum, Indoor Attraction	Explore Ancient Egypt and Western Asia, the Himalayas, China, Japan, Korea and Southeast Asia all in one museum. The Oriental Museum is devoted to the art and archaeology of the great cultures of North Africa and Asia.	Medium
Empire Consett	Cinema, Event Venue, Theatre	The Empire Consett, is a much loved and well used town centre arts venue.	Medium

¹ Small (under 100), Medium (under 500), Large (500+)

Page 19	Gala Durham	Cinema, Theatre	The Gala Theatre is a superb arts venue in the heart of Durham City with 500 seat theatre, 2 cinema screens and a stylish cafe bar.	Medium
	Hardwick Park	Historic Site, Parkland	An 18th Century parkland featuring beautiful views, rich heritage, archaeological remains and ecological diversity.	Large
	High Force Waterfall	Lake / Reservoir, Natural Feature, Nature Trail	High Force is one of the most impressive waterfalls in England. The River Tees has been plunging into this gorge for thousands of years but the rocks it reveals are far more ancient – with origins dating back over 300 million yrs.	Large
	Killhope Lead Mining Museum	Water Mill, Museum, Mine	Killhope is a multi award winning Victorian lead mining museum offering a great day out for the family. Guided mine tours, working water wheel, original machinery, exhibitions, workshops, family events, performances, stunning scenery, shop and cafe.	Medium
	Locomotion, Shildon	Heritage / Visitor Centre, Museum	Part of Science Museum Group. At Locomotion you can see highlights of the national collection of railway vehicles in the world's first railway town.	Large
	Mining Art Gallery - The Auckland Project	Gallery, Arts Centre	With three permanent rooms and one temporary exhibition space on the ground floor, the gallery explores working life in the coal mines through original artefacts and artworks by prominent mining artists such as Tom McGuinness and Norman Cornish.	Small
	North Pennines Area of Outstanding Natural Beauty (AONB)	Nature Reserve, Waymarked Trail, Sightseeing	Incorporating much of the Durham Dales, and is a stunning landscape of open heather moors, dramatic dales, tumbling upland rivers and wooded areas	Large
	Old Cinema Launderette	Event Venue, Music	Old Cinema Launderette is a Launderette/Venue/Bar. Check out our gig listings and bring in your laundry.	Small
	Raby Castle	Castle / Fort, Historic house	A stunning complete medieval castle and deer park	Large
	Seaham Harbour Marina	Viewpoint, Marina, Sightseeing, Beach	The multi award-winning Seaham Marina is County Durham's only	Large
	The Assembly Rooms Theatre	Event Venue, Theatre	The Assembly Rooms Theatre is an historic, 175-seat proscenium-arch theatre located at the heart of Durham City.	Medium
	The Auckland Project - Auckland Castle	Castle / Fort, Historic Palace	Positioned high above the meandering River Wear, Auckland Castle was once home to the Prince Bishops of Durham, and was the place where they entertained, hunted and worshipped.	Large
	The Bowes Museum	Gallery, Museum	An iconic building and Museum set in the vibrant market town of Barnard Castle in the midst of Teesdale, housing outstanding collections of European fine and decorative art.	Large
The Spanish Gallery - The Auckland Project	Gallery, Indoor Attraction	The Spanish Gallery tells a story of Golden Age Spanish art during the 16th and 17th centuries, exploring how its artists expressed the tension between man's yearning for eternity and the self-evident transience of life.	Medium	
Ushaw: Historic House, Chapels and Gardens	Event Venue, Historic House	Tucked away in beautiful open countryside near Durham City, Ushaw's Historic House, Chapels & Gardens are open to all.	Large	

Culture & Visitor Economy

Scrutiny Committee 14 April 2023

Alison Clark
Head of Culture Sport & Tourism



Agenda



Provide a snapshot of current activity and future opportunities in relation to culture & the visitor economy



Highlight the key aspects of the developing destination management plan



Provide insight into the 2022 visitor survey

Service Overview

Culture

- Library Services
- 3 theatre venues & 4 heritage/museum venues
- Significant Heritage & Arts collections including Nationally accredited DLI
- Archives
- Festivals and Events Programme

FTE
202.12

Tourism

- Destination management & marketing
- NE Destination Development Partnership
- Research & Insight

FTE
13.49

Opportunity context

New destination management plan

Destination development partnership

Outdoor & Environment

Inclusive economic strategy

City of culture legacy

Priority places

BBC strategy/NESIP



- **DuBois Review & DCMS Response**

- Develop and administer a new accreditation scheme for strategic DMO's that will see them become Local Visitor Economy Partnerships (LVEP)
- Pilot a 'top tier partnership' of accredited LVEP's through a 'Destination Development Partnership'

An *Inclusive* Economic Strategy



Inclusive in development
Through the Big Econ-versation



Inclusive and green in design
Going beyond a traditional economic strategy



Inclusive in delivery
Delivered as a partnership

Delivery Framework - The 5 “P’s”



Promotion - priorities

- **We will promote our county, assets and opportunities to businesses, investors, visitors, developers and residents**

Priorities

- **Develop a clear brand and place marketing**
- **Attract more inward investment in the sectors and places it make sense**
 - **Grow a year-round visitor economy**
- **Enhance cultural and creative infrastructure**



County Durham – opportunities

Major employment sectors

- Advanced manufacturing
- Health and social care
- **Visitor and tourism**



25,000
jobs in advanced
manufacturing



2,000 life science &
pharma jobs and
25,000 in health and
care

Key opportunity sectors for growth

- Green jobs
- Electronics
- **Digital and creative**
- Fintech
- Life sciences
- Satellite applications



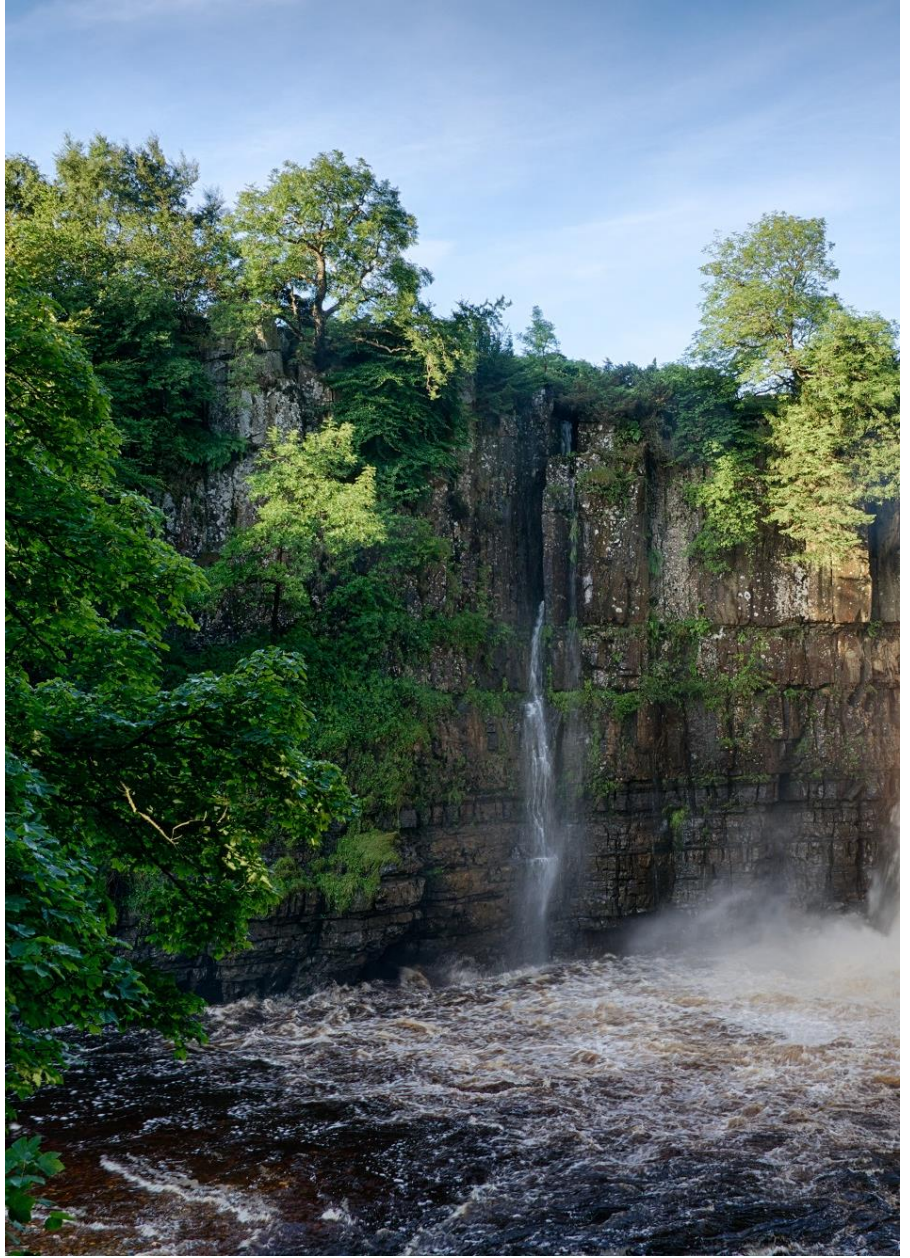
10,000+
jobs in tourism & supply
chain

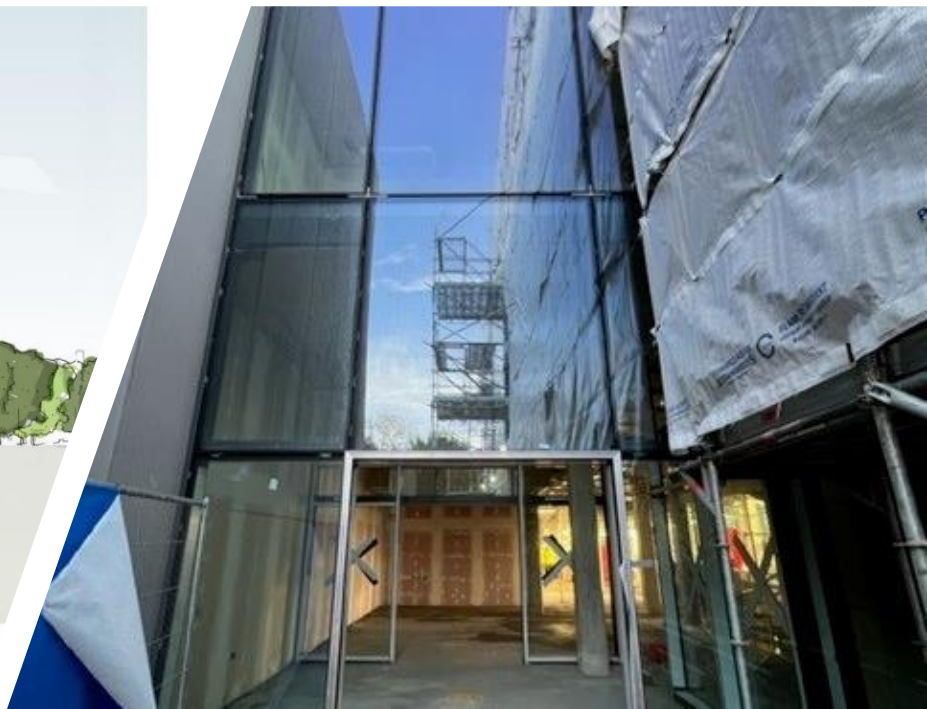


16m visitors and
£827m spend



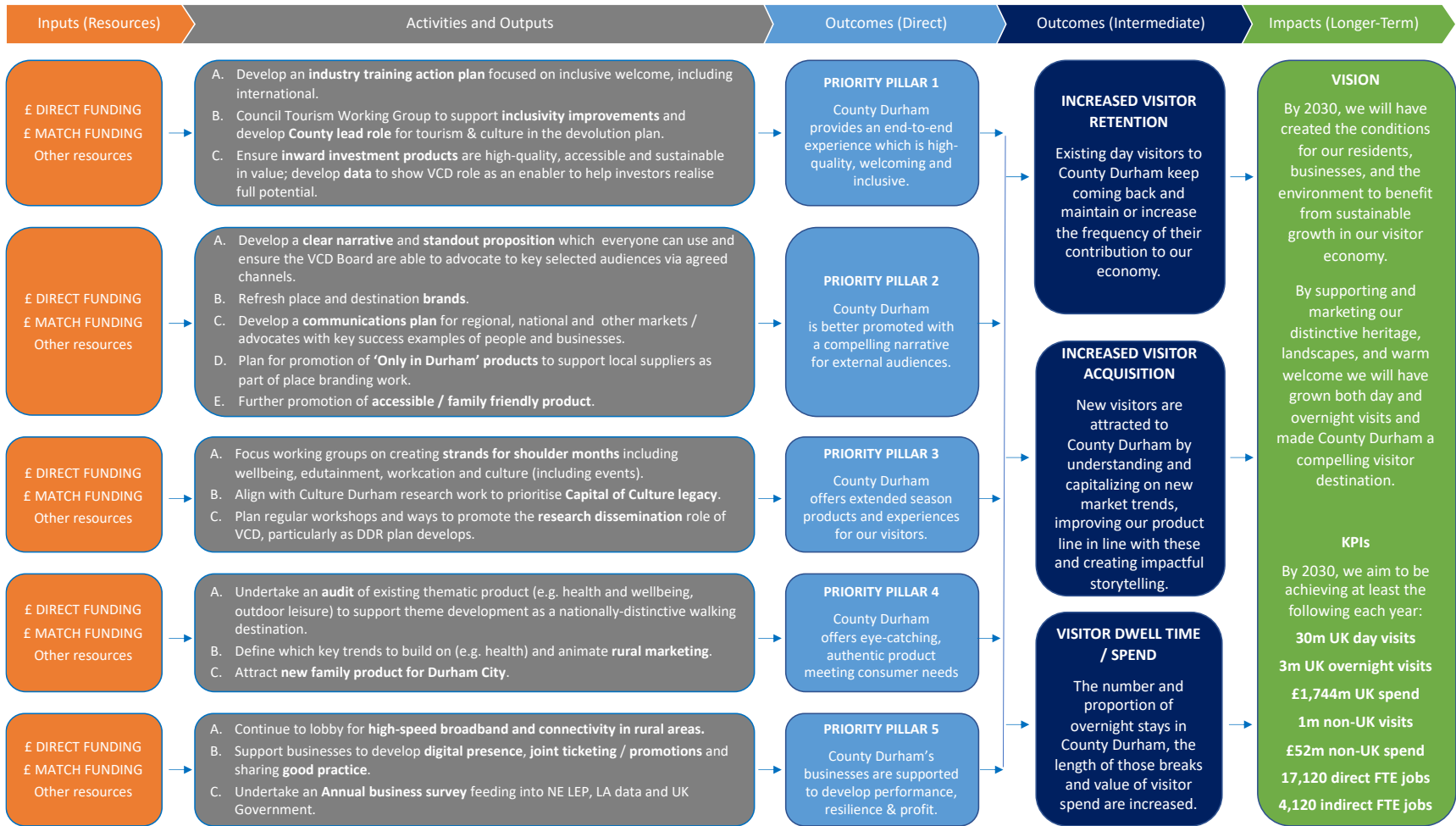






Destination Management Plan





Unique history and heritage.

Outstanding cultural/natural assets.

Strong/experienced partnerships.

Supporting infrastructure.



County Durham provides an end-to-end experience which is high quality welcoming and inclusive



County Durham is better promoted with a compelling narrative for external audiences



County Durham offers extended season products and experiences



County Durham offers eye-catching authentic product that meets the needs of consumers



County Durham's business are supported to develop performance resilience and profit

INCREASED VISITOR ACQUISITION

New visitors are attracted to County Durham by understanding and capitalizing on new market trends, improving our product line in line with these and creating impactful storytelling.

INCREASED VISITOR RETENTION

Existing day visitors to County Durham keep coming back and maintain or increase the frequency of their contribution to our economy.

VISITOR DWELL TIME / SPEND

The number and proportion of overnight stays in County Durham, the length of those breaks and value of visitor spend are increased.

Destination Development Plan 2023-2026

- **Developed with stakeholders and evidence-based**
- **Closer alignment to other strategy and activity**



Questions & Observations

Visitor Survey 2022 Results



Supported by



Methodology

- 1,200 face to face interviews
- 18 key locations across the county during summer 2022.
- The previous visitor survey was completed in 2019.
- Due to the global Covid-19 pandemic and the changing landscape of the visitor economy, not all results have been compared to those of the previous survey



Key objectives

To understand the following;

1. Visitor profiles (demographics, group composition and distribution of overnight and day visitors)
2. Where people source information about what to do in Durham
3. Key drivers for visits
4. How visitors move around the destination
5. Awareness levels of the visitor offer in Durham
6. Visitor experience and identify areas for improvement
7. Average spend of visitors
8. Dwell time

Demographics

- The majority of visitors were in the 36-65 age category (78%), (63% in 2019).
- Visitors were mostly from the North East region (39%). In 2019 50% of visitors were from the North East.
- 14% were from Yorkshire and 11% from the North West.
- 4% of visitors were from overseas (3% in 2019)
- Using post code analysis outside of the North East, there were a large amount of visitors from the Leeds area and North West.
- There were also visitors from the West Midlands, particularly Birmingham.
- In the South, London had the largest concentration of visitors.



Visitor Profile

Page 40

- 43% were on a day trip of more than 2 hours
- 46% were on an overnight visit
- 47% were visiting with their partner only
- 35% were visiting with family members



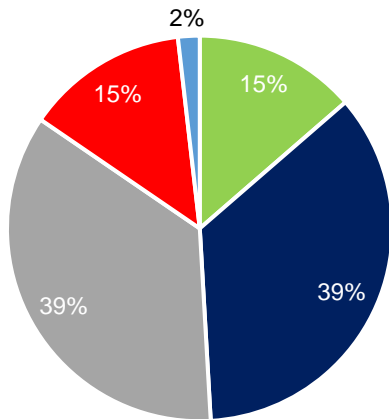
Overnight visitors

- Over a quarter (27%) had planned/were staying in self-catering accommodation
- One fifth (20%) were staying with friends or relatives
- 18% were staying in a caravan, motorhome or glamping
- 16% were staying in a hotel with up to 49 bedrooms
- 31% researched their stay via the internet and 16% via review sites such as TripAdvisor.
- 34% booked via an internet site and 25% booked directly with the accommodation via telephone. Shift from booking accommodation directly with host online in 2019 to a specific third party site in 2022.
- Half of respondents booked between 1 and 3 months ahead of their visit (aligning to behaviour in 2019). 18% booked 2-4 weeks ahead and 20% had booked between 3 and 6 months in advance. 4% had booked in the week of their visit.
- On average visitors planned to stay for 5 nights away from home, with 4 of those nights in Durham (other locations for the rest of the stay included Northumberland, Cumbria, Edinburgh, Manchester and London).

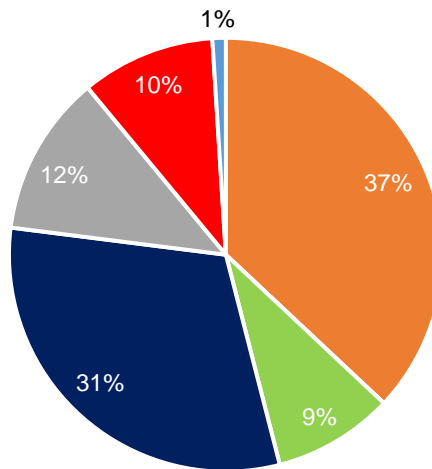
Average Spend

- Local day visitors on average spent £37.61 per visit
- Non local day visitors on average spent £45.10 per visit
- Overnight visitors on average spent £391.24 per trip

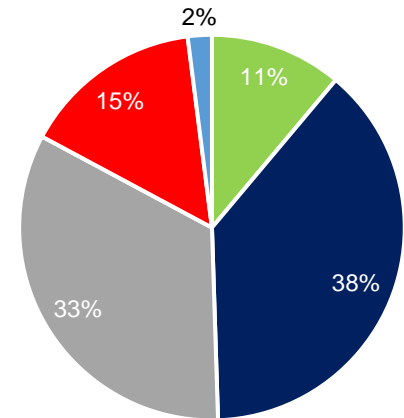
Local Day Visitors



Overnight visitors



Non local day visitors



■ Accommodation ■ Entertainment ■ Food and drink ■ Shopping ■ Transport ■ Other

Average spend for day and overnight visitors

Average Spend per day	2019	2022
Day Visitors	£57.75	£41.36
Overnight Visitors	£83.29 (Ave Length of Stay 3 Nights)	£97.81 (Ave Length of Stay 4 Nights)

Researching the Destination

Durham Pocket Guide

- 10% of respondents used the Durham pocket guide during their visit
- Of those who used it visited at least one establishment because of an advert they had seen.



Sources of Information



- 58% of respondents found out about Durham prior to their visit from friends or family (27% in 2019) and 46% from a previous visit (60% in 2019) . 37% used the thisisdurham website (2% in 2019).
- When asked about social media usage, 50% had found information on Instagram, 36% on YouTube and 14% on Facebook.
- 52% had picked up information during their visit (47% in 2019) , with 76% getting this from an attraction during their visit. (47% in 2019)

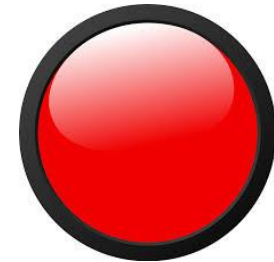
Visitor activity

- Respondents were asked about what activity they would participate in during their visit (and could choose more than one), 78% stated eating out, 70% general sightseeing, 68% walking, 57% visiting historic or artistic exhibits and 53% visiting historic sites.
- When asked about their main activity during their visit, 40% stated general sightseeing, 14% visiting historic or artistic exhibits, 9% visiting heritage sites and 8% walking.
- The most frequently listed attractions cited as visited or due to visit were Beamish, Durham Cathedral & Castle, High & Low Force, Auckland Castle, Raby Castle, Bowes Museum and Hamsterley Forest.

Visitor Experience

- When asked what they liked most about Durham, respondents stated the peaceful nature, the variety of things to do, friendly people and value for the whole family were key attributes.
- A few first time visitors mentioned the county exceeded their expectations with its architectural and natural characteristics.
- Respondents were asked if they would change anything about the destination with most responses saying that they didn't think it needed any suggestions. Those that did have suggestions, mentioned better signage, more public toilets, more bins and lower attractions prices.
- All respondents said they would recommend the destination and 96% would visit again.
- 47% scored their visit as 10 out of 10 and 42 gave a score of 9 out of 10.

Visitor Satisfaction



- Cleanliness of the area
- Nightlife
- Quality of visitor attractions
- Variety of things to do
- Accommodation

- Visitor Information Points
- Public transport
- Ease of parking
- Cleanliness of public toilets
- Road signposts
- Eating establishments

- Availability of public toilets
- Distinctive shopping experiences

Any questions?