



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

Date **Friday 3 November 2023**
Time **9.30 am**
Venue **Committee Room 1A , 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 for Absence
2. Substitute Members
3. Declarations of Interest, if any
4. Items from Co-opted Members or Interested Parties, if any
5. Overview of County Durham's Visitor Economy:
 - a) Report of the Corporate Director of Regeneration, Economy and Growth (Pages 3 - 50)
 - b) Presentation by the Strategic Manager, Tourism and Visitor Economy (Pages 51 - 64)
6. Such other business as, in the opinion of the Chair of the meeting, is of sufficient urgency to warrant consideration

Helen Bradley
Head of Legal and Democratic Services

County Hall
Durham
26 October 2023

To: **The Members of the Economy and Enterprise Overview and Scrutiny Committee:**

Councillor B Moist (Chair)
Councillor A Surtees (Vice-Chair)

Councillors M Abley, A Batey, G Binney, R Crute, M Currah, D Freeman, P Heaviside, G Hutchinson, A Jackson, C Lines, L Maddison, R Manchester, J Miller, R Ormerod, I Roberts, K Robson, K Shaw, M Stead and A Sterling

Co-opted Members:

Mrs R Morris and Mr E Simons

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

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

Councillors M Abley, E Adam, P Atkinson, L Brown, R Crute, C Kay, C Lines, B McAloon, I McLean, D Nicholls, D Oliver, J Purvis, A Reed, P Sexton, A Simpson, T Stubbs, D Sutton-Lloyd, S Townsend and R Yorke

Co-opted Members:

Mr T Cramond and Mr P Walton

Contact: Jo March

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



3 November 2023

Overview of County Durham's Visitor Economy

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

Purpose of the Report

- 1 This report sets out the purpose and process of the draft Destination Management Plan 2023-2030 and seeks feedback and endorsement from Environment and Sustainable Communities, and Economy and Enterprise Overview and Scrutiny Committees.

Executive summary

- 2 County Durham has had a Destination Management Plan (DMP) since 2006, it is compiled by Visit County Durham in collaboration with the county's tourism industry and a broad range of stakeholders and partners. The destination management plan is the blueprint for the growth and development of the visitor economy in the county.
- 3 This Destination Management Plan is equivalent to a strategy and action plan for sustainable tourism development in a destination. It is a shared statement of intent to manage the visitor economy in the county over a stated period of time, articulating the roles of the different stakeholders and identifying clear actions that they will take and the apportionment of resources.
- 4 The DMP clearly identifies challenges, gaps and opportunities for a successful, sustainable visitor economy, setting a strategic direction for County Durham with prioritised actions within an annual rolling programme.
- 5 The objective of the plan is to ensure that the tourism sector and broader visitor economy performs to its maximum capacity and brings sustainable benefits to the county and its' residents in the form of opportunity and job creation. It identifies how challenges can be overcome, product gaps and future opportunities for growth, enabling us to set out an evidence based approach for development and investment in the visitor economy product.

- 6 A 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 County 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.
- 7 The plan is based on a series of studies that provide intelligence about the county's product, its customers and its competitive position in England, the UK and internationally. It clearly describes what all organisations, businesses, and individuals in and external to the county, with an interest in the success of the visitor economy, need to focus on for future success.
- 8 The DMP will in turn shape and determine the priorities for Visit County Durham's own business plan. The priorities which emerge from developing the DMP will be shared across the destination and focus activity in developing the county as a visitor destination.
- 9 The policy context and strategic framework for the DMP is set at the national level by Government and VisitEngland / VisitBritain. Regionally via the pilot Destination Development Partnership and North East Devolution Deal, a 10-year regional visitor economy strategy will be developed within the next year, and at a county level through the County Durham Inclusive Economic Strategy and County Durham Plan.
- 10 The DMP is the detailed visitor economy plan of the County Durham Inclusive Economic Strategy setting out the aims and objectives for tourism's contribution to an inclusive, green, sustainable economy.
- 11 The DMP will inform priorities for development at a regional level via the pilot Destination Development Partnership (DDP) as set out in the North East Devolution Deal. County Durham's priorities will feed in to a 10-year regional tourism strategy which will be developed in partnership and approved by the DDP Board which has representation from the Chairs of the region's three destination management organisations and LA7 Chief Executive Officers.
- 12 Working with key partners and stakeholders the plan is refreshed annually to reflect new developments and intelligence including visitor surveys, annual economic impact surveys, benchmarking reports and major one-off studies such as perception research or visitor accommodation studies.
- 13 Final sign-off and adoption of the Destination Management Plan 2023-2030 will be by the board of Visit County Durham and the Durham County Council.

- 14 Monitoring progress and the impacts of the plan will be assessed annually by the Visit County Durham board, results will be reported to Durham County Council and to partners and stakeholders.

Recommendation(s)

- 15 Members of the Joint Special Economy and Enterprise and Environment and Sustainable Communities Overview and Scrutiny committee are asked to consider the report and provide feedback on the draft Destination Management Plan in Appendix 2.

Background

- 16 In March 2020 Visit County Durham embarked on a programme of work designed to refresh and track progress against the Destination Management Plan 2016–2020. The process would test the existing objectives and the approach to each to see if they were still valid and to discover if any new priorities had emerged since the plan was first developed. The aim was to produce the next iteration of the management plan covering the period 2021 to 2025.
- 17 The initial consultation took the form of an industry conference workshop in early March 2020 that was attended by more than 120 delegates representing businesses and organisations from across the county. In summary, attendees were asked to comment on current priorities and identify future priorities.
- 18 However, three weeks later the Prime Minister announced the first UK lockdown ordering people to stay at home, this was followed by further lockdowns and the restricted movement of people, meaning limited or no travel for leisure and for work, which had serious repercussions for the global visitor economy.
- 19 Work to update the DMP was paused, until the UK reached a position of relative stability, entering in to the ‘living with Covid’ phase. This was followed by a period of recovery, the VCD team focus was on supporting the industry to get back to business. Work to produce a new destination management plan restarted in early 2023.
- 20 As part of Visit County Durham’s national recognition and accreditation as a Local Visitor Economy Partnership, annual Growth Plans are produced in collaboration with the national tourist authority Visit England and a Destination management Plan is an essential requirement for all destinations hoping to achieve accreditation.
- 21 This new programme and national structure have been designed to enable and deliver closer collaboration between Visit England and destinations that are well integrated and delivering in partnership with all

key public and private sector partners, and who clearly provide strong local leadership and governance in their destination.

- 22 A copy of the draft plan has been shared with the Visit England team.

Destination Management Plan Development

- 23 The Destination Management Plan is developed using the principles of a sustainable development model known as VERB (**V**isitor, **E**nvironment, **R**esident, **B**usiness) a simple but effective framework around which to consider the long-term sustainability and impacts of the visitor economy and destination planning. The needs of each element of the VERB model are taken in to account during the decision-making process for priority setting, development, and promotion.

The DCC Visit County Durham team and the VCD advisory board lead the development of the plan. The Visit County Durham executive team are part of the Regeneration Economy & Growth directorate. The Visit County Durham board is led by a private sector Chair, who also represents visitor economy interests on the County Durham Economic Partnership board. Durham County Council has a right of two places on the VCD board – these are held by the Portfolio Holder for Economy & Partnerships and the Corporate Director for Regeneration Economy & Growth. Remaining board places are drawn from the private sector.

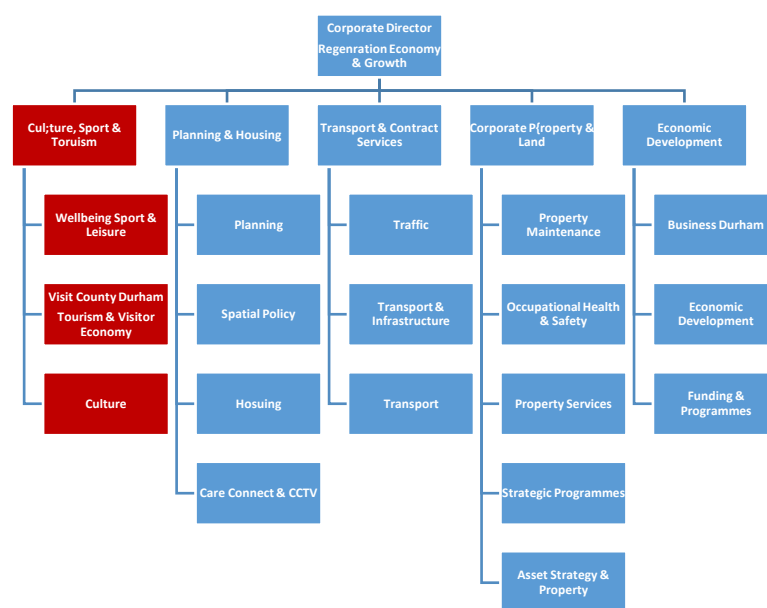


Figure 1 Regeneration Economy & Growth Structure

- 24 Figure 1. Regeneration Economy & Growth Structure shows Visit County Durham within the Culture, Sport & Tourism service and gives a visual representation of how multidisciplinary teams work together across the directorate.
- 25 The process to refresh the plan has engaged DCC and a broad range of partners representing businesses, education providers, and third sector

organisations, which has resulted in a plan that is coordinated, connected with an agreed approach, and set of priorities. The process also included an extensive strategic document review and an analysis of current and future trends affecting the visitor economy.

- 26 To support delivery of the DMP priorities a cross directorate Durham County Council Tourism Internal Working Group was established which meets quarterly. Appropriate representation from DCC form the group, which assists in the co-ordination of activity to ensure a primary focus on the delivery of the key actions outlined in the DMP. This group were consulted in the initial stages of development and will be a consultee on the draft plan prior to adoption and publication.
- 27 Other consultees on the draft DMP prior to adoption and publication include the Visit County Durham Board, VCD Strategic Partners, Regeneration, Economy and Growth Management Team, Environment and Sustainable Communities, and Economy and Enterprise Overview and Scrutiny Committees and the Tourism Internal Working Group.
- 28 Using the results from the industry conference held in March 2020 as a baseline for questions, we surveyed visitor economy business partners to identify shifts in priorities. The survey was distributed to our partner database of c1,200 contacts. A series of presentations and discussions with relevant organisations and forums was undertaken. We also engaged with regional partners and Visit England to ensure the plan and priorities aligned.
- 29 The strategy has been informed by DCC resident consultations for the development of the County Durham Plan and Inclusive Economic Strategy gathered during the Big Econ-versation, we have used feedback to inform the DMP development from a resident perspective, ensuring that the voice of our communities will be reflected in the final plan.
- 30 The plan is built on 5 key pillars or direct outcomes so that County Durham:
 - a) provides an end-to-end experience which is high quality welcoming and inclusive.
 - b) is better promoted with a compelling narrative for external audiences.
 - c) offers extended season products and experiences.
 - d) offers eye-catching authentic product that meets the needs of consumers.
 - e) businesses are supported to develop performance, resilience and profit.
- 31 The approach we have taken to develop the DMP includes a logic model to articulate the logic that underpins the intervention: how the

proposed inputs and activities and outputs will lead to the intended stakeholder benefits (outcomes and impacts), with target outcomes derived from the consultation exercises and the 8 priorities from the Destination Management Plan 2016-2020, which were deemed as still relevant by stakeholders and partners:

- a) Lengthen the amount of time visitors stay (DWELL TIME/SPEND)
- b) Improve the quality of the experience post-arrival (EXPERIENCE)
- c) Differentiate the county for external audiences (POSITIONING)
- d) Attract new staying visitors (VISITOR ATTRACTION)
- e) Retain existing day visitors (VISITOR RETENTION)
- f) Address seasonality (SEASONALITY)
- g) Develop new product/support existing product (PRODUCT)
- h) Improve SME and micro business performance (CAPACITY)

32 Recognising that a visitor may be a local or regional resident, travelling from another part of the UK or an international traveller, the intermediate outcomes focus on the visitor.

- a) Visitor retention
- b) Visitor attraction
- c) Visitor acquisition

33 The activities, outputs and outcomes are designed to support the achievement of the overall vision leading to sustainable growth that balances the needs of visitors, businesses, communities, and the environment.

Sustainability and Regenerative Tourism

34 The Destination Management Plan helps us to better understand our county as a visitor destination, setting out where we are now, where we aim to be and how we are making progress. The DMP also sets out the path for action during the lifetime of the plan. It helps us to attract the kind of tourism that we want to have. It also helps to ensure that our actions for development lead to positive progress for our communities and the environment.

35 There is still plenty of room across our county and across the year for growth, but we are only marketing what we can manage successfully. A commitment to sustainability now comes as standard for all places that wish to attract tourism but in a county with a heritage city and heritage story at its core and protected landscapes from countryside to coast this is a genuine differentiator for us.

36 Our commitment to sustainability influences everything we do: working with partners to ensure our assets are managed sensitively, supporting and promoting responsible transport and travel choices, promoting and supporting authentic products and services, buying food, services and

supplies locally, supporting the development of local talent, celebrating local entrepreneurship, improving digital connectivity, providing year-round economic opportunities and involving communities in decision making and delivery.

- 37 In October 2020 we worked with a DCC Sustainability and Climate Change Officer from the Low Carbon Economy Team, who completed a sustainability appraisal of the Destination Management Plan 2016-2020. The appraisal report recommendations, where feasible, have been used in the development of the current draft plan.
- 38 As part of government's Destination Development Partnership Pilot we have commissioned Global Destination Sustainability Movement (GDS-Movement) to support the region with a strategy for sustainable development over the next couple of years. As part of this work the region's larger destinations are participating in the Global Destination Sustainability Index, Durham and Newcastle/Gateshead have signed up for three years from 2023, Sunderland will join next year.
- 39 The GDS-Movement unites and enables destination management professionals to create flourishing and resilient places to visit, meet, and live in. Their mission is to co-create sustainable and circular strategies, mindsets, and skill sets that enable destinations of the future to thrive, and society and nature to regenerate.
- 40 GDS-Movement work with 100+ municipalities, national/regional destination management organisations, and convention bureaux, to co-create tourism and events strategies, benchmark, and improve sustainability performance, and transform their value chains to catalyse regeneration.
- 41 Durham participated in the benchmarking index for the first time this year with an overall score of 42% across four categories: DMO, Supplier, Social, Environmental. We have received a full report that clearly sets out where we are performing well and where there is room for improvement. Work with businesses and partners and is underway to implement recommendation and improve the score for 2024.

Monitoring and evaluation

- 42 VCD has an established system to monitor tourism performance indicators, including visitor numbers, satisfaction levels, economic impacts, and environmental sustainability. But alongside high-level performance and economic data we will monitor and report the outcomes of projects and will work to find solutions for more closely integrating data from national and local sources.
- 43 An annual evaluation of the plan will be undertaken to assess the effectiveness and review progress against objectives. Necessary adjustments will be made based on feedback and data. Progress and

achievements will be shared with stakeholders and partners to maintain transparency and accountability.

- 44 As part of Visit County Durham's national recognition and accreditation as a Local Visitor Economy Partnership, progress will be monitored through Visit England's Growth Plan process.

Governance and Publication

- 45 The Visit County Durham Board will continue to approve and oversee the Destination Management Plan and VCD partners will be encouraged to use the plan. To support partners in the delivery consideration will be given to creating focused sub-groups under each of priorities within the plan. Individual working groups or task groups will also be set-up to develop ideas into projects, which have well-defined resources, timescales, and outcomes.
- 46 E&SC/E&EOSC's will continue to be integrated into the process for the implementation and review of the DMP in the future. Scrutiny Committee's play an important role in representing the voices of local residents and organisations alongside other local consultation and partnership working. Regeneration Economy and Growth (REG) and Economic Development management team and Tourism Internal Working group will also continue to assess and review progress, making recommendations.
- 47 Visit England will continue to be integrated into the process for the implementation and review of the DMP in future, ensuring alignment with Government policy and national strategic objectives.

Conclusion

- 48 Members of the committee are asked to consider the report and provide feedback on the draft Destination Management Plan in Appendix 2.

Background papers:

- [Durham Tourism Management Plan 2016-2020](#)

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Appendix 1: Implications

Legal Implications

None.

Finance

None.

Consultation

The Destination Management Plan has been developed in partnership with Visit County Durham partners and DCC colleagues using evidence from tourism performance indicators, including visitor numbers, satisfaction levels, economic impacts, and an environmental sustainability appraisal. The Environment and Sustainable Communities Overview and Scrutiny Committee, and Economy and Enterprise Overview and Scrutiny Committee's provide a local voice for the development of the Delivery Plan. Feedback from resident surveys and consultation for the County Durham Plan and Inclusive Economic Strategy has been used.

Equality and Diversity / Public Sector Equality Duty

None.

Human Rights

None.

Climate Change

As part of our commitment and approach to regenerative tourism Visit County Durham is a member of the Global Destinations Sustainability Index to monitor and improve performance of the visitor economy. A sustainability appraisal will be undertaken by the DCC Climate Change team.

Crime and Disorder

None.

Staffing

None.

Accommodation

None.

Risk

None.

Procurement

None.

DRAFT

DESTINATION MANAGEMENT PLAN
2023 to 2030

Visit County Durham

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SECTION 1. FOREWORD AND INTRODUCTION

1.1 FOREWORD FROM VISIT COUNTY DURHAM CHAIR & DURHAM COUNTY COUNCIL LEADER (MG UPDATE)

Nearly £1 billion a year flows into County Durham from our visitor economy, which employs over 10,000 people. However, our passion for the visitor economy is about more than jobs and money. The high-quality visitor attractions, accommodation, cultural events, things to see and do, and places to eat and drink that are essential for visitors are also vital to making County Durham a great place to live and work.

One of the best things about our County, and a huge part of our history, is the way that people work together for the common good. That spirit of collaboration is essential to growing our visitor economy and, throughout the process of putting together this Destination Management Plan, it has been encouraging to see public, private and third sector businesses and organisations participating enthusiastically in our consultations to ensure we deliver together what is best for us all. Thank you to everyone who came to a workshop, filled in a survey, or participated in a consultation with our consultancy partners Counterculture.

We know that only well-managed, distinctive destinations who can communicate clear and compelling messages about why people should visit will attract business and investment. That is the reason for our Destination Management Plan (DMP). The DMP sets out our collective vision for Durham's visitor economy, the outcomes we want to see, the priorities for achieving those outcomes, and the actions we need to take together to deliver.

The DMP has been commissioned by Visit County Durham, and we will take a lead in ensuring it is delivered. But for a DMP to really make a difference it requires the active support of organisations and people across the visitor economy. Many of the actions we need to take can only be done together – working out how we will reach new segments of visitors, developing tourism products that will attract visitors and make them want to stay longer and building the infrastructure to enable that.

I am excited to be part of this journey, and look forward to working with you all as we grow County Durham's visitor economy in a sustainable, inclusive way.

1.2 DESTINATION MANAGEMENT FOR VISIT COUNTY DURHAM

The *County Durham Vision 2035*, developed by a wide range of organisations with extensive public input, has three priorities for the county:

- More and better jobs
- People live long and independent lives
- Connected communities

We know that a successful visitor economy can help deliver all of these, especially the first and third, but also that poorly managed tourism can be harmful to places and their residents. Destination Management is about ensuring that the visitor economy has an impact for good across our County.

Visit County Durham is the body charged with working on behalf of businesses and public agencies to support the healthy growth and development of the county's visitor economy. We do this particularly through our Partnership Scheme which is designed to encourage all tourism related businesses and organisations to work together for the success of our county and to grow the visitor economy.

We deliver for local people and businesses through Destination Management – the process of leading, influencing and coordinating the successful management of all the aspects of County Durham as a destination that contribute to a visitor's experience, taking account of the needs of visitors, local residents, businesses and the environment.

1.3 OUR DESTINATION MANAGEMENT PLAN

This Destination Management Plan (DMP) is the key strategy and action for plan for sustainable tourism development in County Durham. It is a shared statement of intent from Visit County Durham and our Partners that sets out our vision, the outcomes we want to see, and the priorities we have set to enable those outcomes. It articulates the roles of different stakeholders and identifies clear actions that Visit County Durham, our partners and other stakeholders can take to deliver the outcomes.

The DMP is designed to help co-ordinate a huge range of activities that, together, transform the quality of visitors' experience and the viability of visitor economy businesses so that tourism can be sustainable (financially and environmentally) and welcomed by our communities. Building on our already strong partnership approach this DMP will help us attract funding and investment, not just in the visitor economy but across the county.

The Destination Management Plan is a key driver for the content of Visit County Durham's own business plan, and we hope that it will serve that function for our partners too – as we all work together to make County Durham a place more people want to visit more often and grow more connected to.

This DMP covers the period 2023-2027, but many of the actions are happening now and over the next two years, and we have targets to meet every year! We will refresh the action plans annually to ensure that we are responding to changing circumstances effectively.

Our Destination Management Plan has been drawn up by the Visit County Durham team with assistance from our consultants Counterculture in line with guidance provided by Visit Britain (www.visitbritain.org/developing-your-destination-management-plan)

SECTION 2. VISIT COUNTY DURHAM

2.1 INTRODUCTION TO VISIT COUNTY DURHAM

Visit County Durham (VCD) is a Local Visitor Economy Partnership (LVEP), a strategic, high performing destination organisation representing County Durham at the local and national level. Our operating model is that of a destination management organisation working within the framework of a local authority. We deliver Durham County Council's visitor economy service, and the VCD core team and service delivery are embedded in the Regeneration, Economy, and Growth directorate of Durham County Council.

Our role is primarily as an enabler and partner, working across the sector and with stakeholders regionally and nationally. We work closely with VisitEngland, VisitBritain, DCMS and a wide range of public and private sector partners and tourism businesses, both in Durham and across England, to develop and grow the county's visitor economy and create jobs and opportunities for residents. We also coordinate the promotion of the county as a great place to live, work, visit, study and invest, both nationally and internationally. We perform the roles of destination management, destination marketing and place marketing.

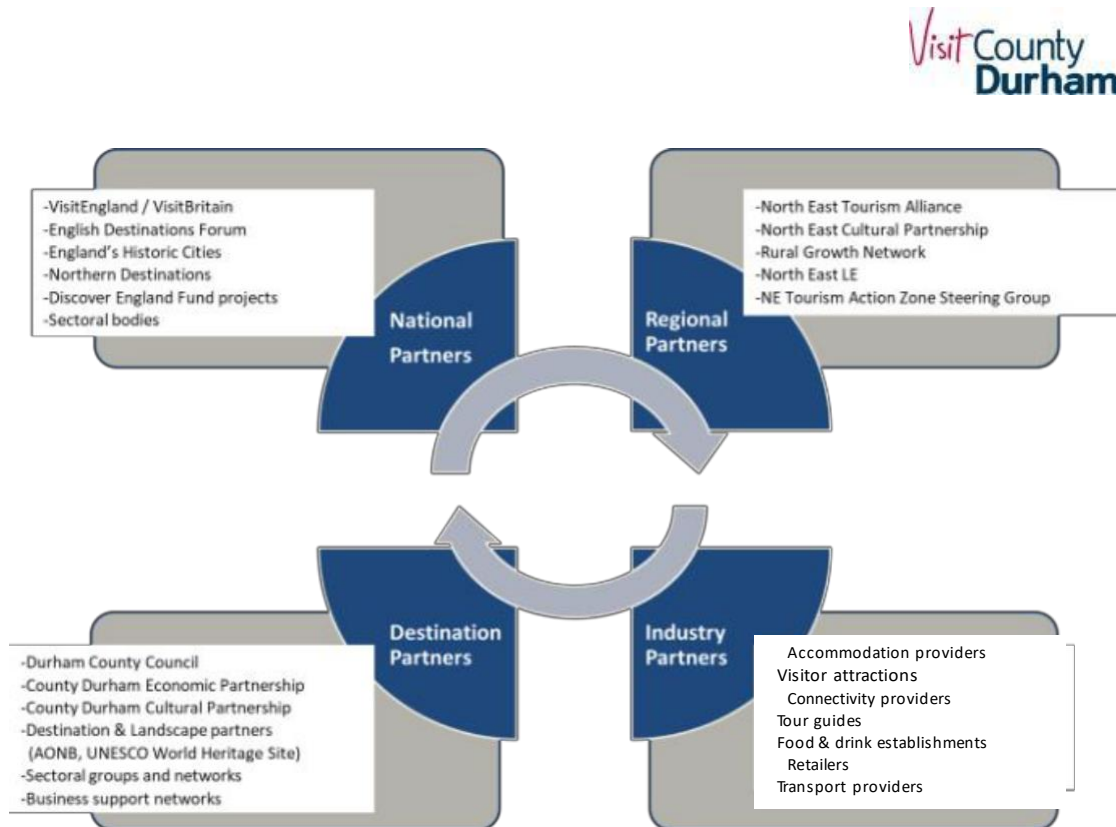
2.2 GOVERNANCE

Visit County Durham sits within Durham County Council but operates a private not-for-profit company with an independent Board who sign off its strategy, budget and annual business plan. The board has 12 directors – 10 from the private sector and 2 from the public sector.

VCD's core budget supports a staff team of 14 FTE's whose core function is setting strategic direction, providing research and intelligence, communication and representation for tourism (regionally and nationally), supporting stakeholder networks, partnership engagement, marketing and visitor information, and support for product development. We also operate a paid for membership scheme, designed to encourage all tourism related businesses and organisations to work together for the success of our county and to grow the visitor economy. Membership income is reinvested to benefit members through networking events, training, activity and research; in addition VCD raises income from grants, co-hosted projects, commercial income generation and project match funding.

Our partners are detailed in Figure 1.

Figure 1: Visit County Durham Partners



2.3 CONTEXT AND OPERATING ENVIRONMENT

The strategic policy framework in which Visit County Durham operates is informed at the national level by Government tourism policy – The Tourism Recovery Plan, published in June 2021. The Plan sets out the role that the UK government will play in assisting and accelerating the tourism sector's recovery from COVID-19.

The UK government wants to build on the UK's position as one of the most desirable tourist destinations in the world and enhance the UK's offer even further by: effectively showcasing and marketing the country's tourism assets; attracting domestic and international visitors; and seeing a growing, dynamic, sustainable and world-leading tourism sector reaching its full potential, creating jobs and driving growth in every nation and region of the UK. To get there, the government has the following strategic objectives:

- Objective 1: A swift recovery back to 2019 levels of tourism volume and visitor expenditure.
- Objective 2: As tourism recovers and then exceeds 2019 levels, the government wants to see the benefits shared across every nation and region.

- Objective 3: To build back better with a more productive, innovative and resilient tourism industry.
 - Objective 4: A tourism industry that contributes to the enhancement and conservation of the UK's cultural, natural, and historic heritage and minimises damage to the environment.
 - Objective 5: A tourism industry that provides an inclusive and accessible offer that is open to all.
 - Objective 6: For the UK to be a leading European nation for hosting business events.

In February 2023 Visit County Durham, alongside NewcastleGateshead Initiative (NGI) and Visit Northumberland, were the first organisations to be recognised by VisitEngland in a new national portfolio of strategic tourism bodies called Local Visitor Economy Partnerships (LVEPs). The LVEPs will work in collaboration with local, regional and national stakeholders on shared priorities to support and grow the visitor economy.

This new programme gives the three North East tourism bodies nationally recognised status as a pilot Destination Development Partnership (DDP) with a stronger strategic relationship with VisitEngland and budget of £2.75 million from national government covering a period to March 2025. They will be critical partners in place-shaping, providing effective leadership and management of the destination and ensuring it is inclusive, accessible and sustainable for visitors nationally and internationally. The DDP will be led by NGI as the accountable body working alongside Visit County Durham and Visit Northumberland.

The aim is to develop the region as a must-visit destination whilst attracting private investment and driving growth. The geography mirrors the North East Devolution area and includes the local authorities of County Durham, Gateshead, Newcastle, North Tyneside, Northumberland, South Tyneside and Sunderland. The region will act as a potential blueprint for the rest of England, and we will help shape the future landscape of destination management organisations, delivering local economic growth through the visitor economy across all seven local authorities.

This pilot is an outcome of the UK Government's response to the independent review of Destination Management Organisations by Nick de Bois. VCD's strategy is also informed by the County Durham Vision to 2035, the County Durham Plan and in particular the County Durham Inclusive Economic Strategy, as well as the North East Devolution deal recently announced by Government.

For further details see Section 3.3.

2.4 ROLE AS DATA AND INTELLIGENCE HUB

Visit County Durham has a key role connecting the area to national and local data and intelligence. We ensure that the County has robust and relevant market intelligence based on good quality and timely research so that decisions by all stakeholders in the visitor economy are based on evidence.

Our regular evidence base includes the following:

- An annual assessment of volume and value of the visitor economy at both county and sub-county level.
- Monitoring sector performance particularly occupancy and visitor attractions numbers.
- Visitor surveying to understand who is visiting, how they visit alongside experience and satisfaction.
- Analyse who the visitors to the destination are and what steps need to be taken to reach those who aren't visiting.
- Analysis of the perception people have of the county.
- Measurement of what people are saying online about the destination in the Tourism Sentiment Index.
- Quarterly business survey to understand the sector through the eyes of the businesses.
- Sector specific research for example accommodation provision.
- Acting as a catalyst of information from regional, national, and international research to the industry through regular research digests.

SECTION 3. WHERE WE ARE NOW

3.1 VOLUME AND VALUE OF THE VISITOR ECONOMY

i) Rebuilding Success

Tourism is an economic driver for the UK and was, until the recent global pandemic, a growth industry and governmental success story. In 2018 it contributed an estimated £106 billion to the British economy and supported 2.6 million Jobs.¹

The global challenges encountered since COVID-19 in 2020, and more recently with the national cost of living crisis, have greatly affected both domestic and international trade – with expenditure, employment and other areas of the visitor economy being impacted.

2023 has started with promising indications of an ‘earlier than predicted’ recovery. VisitBritain are predicting inbound tourism at 35.1 million visits in 2023 (86% of the 2019 level and 18% higher than in 2022) with a £29.5 billion spend (104% of the 2019 level and 14% higher than in 2022).

However, as the UK faces ongoing challenges with high inflation, hotels, restaurants and attractions are in a state of flux, grappling with high food and energy prices, alongside severe labour shortages. This makes accurate forecasting of the visitor economy ‘bounce back’, especially at a domestic level, hard to predict. With global, national and local policy putting tourism centre stage (Section 3.3), and new initiatives such as the Destination Development Partnership in the North East, indications are that the ongoing commitment and momentum can build back a strong, sustainable industry.

ii) Visitor Economy: A Driver for the North East

The full potential of the visitor economy in the North-East is being realised by the investment, collaboration and strategic focus of the NorthEast DDP. Headline objectives for the pilot DDP for the three-year period 2022-25 concern growth, best practice and data, whilst stretch targets include driving overnight visits, increased business events, job creation, attracting capital investment and business growth (see section 3.3/5.2 for further information).

This crucial driver for change will have a fundamental impact on the future volume and value of the visitor economy in County Durham. However, it is important we understand the current state of play as a benchmark for future growth and development.

iii) County Durham: The Current Value of the Visitor Economy

The 2021 visitor economy performance showed that it contributed £826.68 million to the destination, supported 10,063 jobs and attracted 15.77 million visitors. Durham City, Durham Coast, the Durham Dales and Vale of Durham all benefit from the visitor economy as shown in Figure 2.

(At design stage insert original info graphic file here)

¹ Visit Britain official figures.

Figure 2: The Value of Tourism Across County Durham



In 2022, County Durham had good satisfaction levels from visitors with regards to cleanliness, nightlife, quality of visitor attractions, the variety of things to do and accommodation. However, there is room for improvement in key areas such as the availability of public toilets, and distinctive shopping experiences. This is a shift from the 2021 results, where visitor information points and public transport both had room for improvement. Eating establishments has a lower satisfaction score in 2022 than in 2021.

(At design stage, insert original info graphic file here – VCD in process of designing 2022 results so can insert into final report)

Figure 3: County Durham Visitor Experience Rating 2021 (left) and 2022 (right)

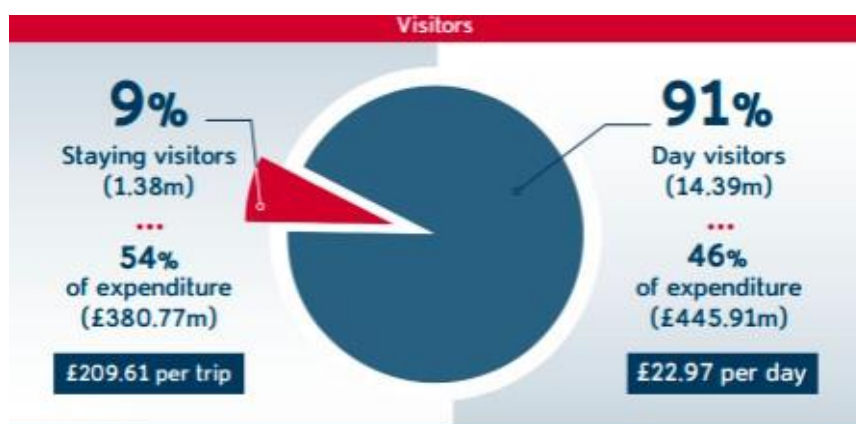


As well as consistent improvement of current satisfaction levels, another area of the visitor economy that needs ongoing focus is the ratio of day visitors to overnight stays.

Currently, 91% of all visitors are day visitors, with only 9% staying overnight. One of the outcomes of this plan is to address this ratio and drive overnight numbers and expenditure. Achieving this is not only a key strategic priority for the county, but also a stretch target for the DDP – so it is an essential metric of success for the whole of the North East England.

(At design stage, insert original info graphic file here)

Figure 4: County Durham Visitor Breakdown



There is also great fluctuation in the visitor economy according to calendar month. We look to address that in the plan, tracking the current visitor flow, and kick-starting strategies to mitigate the challenging low-seasonal attendance.

(CREATE A VISITOR ECONOMY IMPACT BY MONTH GRAPHIC & insert original info graphic file here)

3.2 OUR OFFER

County Durham has a huge range of heritage, cultural, natural and urban assets. The Vale of Durham, Durham Dales, Durham Coast and Durham City provide visitors with a varied quality offer, all within comparatively close proximity. We aim to showcase our distinct assets - celebrating the history, heritage, landscapes and warm welcome that are uniquely County Durham.

(VCD TO INSERT MAP SHOWING VALE, DALE, COAST and DURHAM CITY – maybe with select assets?)

i) Our Attractions

Durham's key visitor attractions include Durham Cathedral and Castle UNESCO World Heritage Site, Beamish Museum, , The Bowes Museum, , The Auckland Experience, Raby Castle, Ushaw , Hamsterley Forest, Locomotion, and National Trust Crook Hall and Gardens. Across the more than 70 core visitor attractions in County Durham, footfall varies hugely, as does awareness amongst visitors. Some of our signature events

and attractions such as Lumiere, the UK's largest biennial light festival (1 million visitors since 2009); Durham Cathedral and Beamish Museum (600,000 visitors in 2021) are flagship attractions that raise national and international interest, while other attractions remain 'hidden gems'. Integrating the whole attractions portfolio thematically and maximising the opportunity that new redevelopments and site-specific projects bring (see Section 4.2), will help boost the profile.

ii) Our Heritage and Culture

County Durham has a wealth of historical and heritage sites: castles, industrial museums, railway heritage, pilgrimage trails, churches and one of the world's greatest cathedrals. These sites and stories are distinct features of the area and can rival the offer in neighbouring destinations. Raising the profile of the richness of that offer, especially through some of the new developments, projects, and programmes available will be key. Durham's City of Culture 2025 bid put a spotlight on the variety and potential for growing the arts and cultural offer in County Durham. Our intention is to leverage new and existing cultural assets and partnerships to strengthen the overall cultural offer across the County.

iii) Our Landscape and Countryside

County Durham can offer visitors huge variety in a compact area – from Geo & Astro tourism to days out at the beach, activities and adventure at Hamsterley Forest, walking the Durham Dales using one of the 120 designated walking or cycle routes, or enjoying a raft of activities such as fishing, bike riding or shooting. With UNESCO accredited sites, Areas of Outstanding Natural Beauty, spectacular coastline and rivers that offer some of the best fishing in the UK, the outdoor offer for County Durham is incredibly strong. The challenge remains integrating this crucial asset into the whole visitor journey, so we can ensure people get the best outdoor experience, alongside easy access to quality accommodation, transport and activities wherever they happen to be in our countryside.

iv) Our Towns

Durham City has many assets, a UNESCO World Heritage site (which was also a major filming location for Harry Potter), a world-class university, historic streets, and fascinating stories. It is a key attractor for the county and wider region and is at the heart of our visitor economy offer. However, it is the central brand of Durham City that is not as prominent as in other comparable destinations - and through our consultation we know is something that our stakeholders feel is critical. We also know that key additional activities for a city break visitor, such as a critical mass of things to see and do including family attractions and accredited gardens, are missing from the overall offer

The county's towns and villages are also important to the overall ecology, supporting key areas including improvements to public realm, better place articulation. Facilitating conversations between partners and interested developers will be critical to raise the experience and impact of our beautiful cities and towns.

v) Our Facilities

Accommodation County Durham has 594 accommodation providers (160 serviced with 50% occupancy, 434 non-serviced with 65% occupancy), totalling 15,391 bedspaces (2021). Only 9% of all visitors stay overnight

(1.38m) and the average spend per trip is £209. In our 2022 visitor survey, accommodation scored between 70% for satisfaction level (rated good). However, we know developing the range, location and quality of accommodation is critical for the overall visitor economy.

Food, Beverage and Retail

The food and drink offer is mainly concentrated in Durham City and the Vale of Durham, and includes a Michelin starred restaurant (The Raby Hunt), microbreweries, and award-winning farm shops specialising in quality local produce and dishes. However, more can be done to develop the county’s food and drink reputation by focusing on local sourcing and promoting products native to the county. VCD produced a Food Tourism Strategy last year – delivery of priorities from that strategy will be a key focus in the next five years. Similarly, we know the retail experience lags behind other areas, with Durham City not having the same core retail offer as other historic cities such as Bath, York and Oxford. This is all coupled with the early evening closure of many shops and cafés which makes some areas feel quiet for a visitor staying overnight. Supporting and advocating for investment, especially in the city centre, will be critical.

Access, Transport and Visitor Services

County Durham’s offer benefits from being varied as well as compact – giving people the choice to have full itineraries, moving from Dale to City to Coast to Vale. However, currently, public transport is not configured to suit the visitor economy. In reality, to access most destinations as part of a day out you need to use a car. There are options to use rail services (Trans Pennine, LNER, Cross Country, Northern), Megabus, public bus, and a variety of independent taxi firms, but the distribution and frequency of these services across the County is patchy. New plans for improved transport links are underway in the Devolution Deal, but our role in advocating for the improvement of the provision and how it supports the visitor economy will be critical.

In terms of other visitor services, there are currently information points in train stations, visitor centres and tourist attractions, but some feedback has indicated improvements are needed. A recent visitor survey showed that toilets, parking, and road signage also need improvement. Feedback from our visitors (2021) on overall visitor experience is shown in the Figure 5 and 6 below.

Figure 5: Visitor Experience – Important Aspects When Visiting the Durham

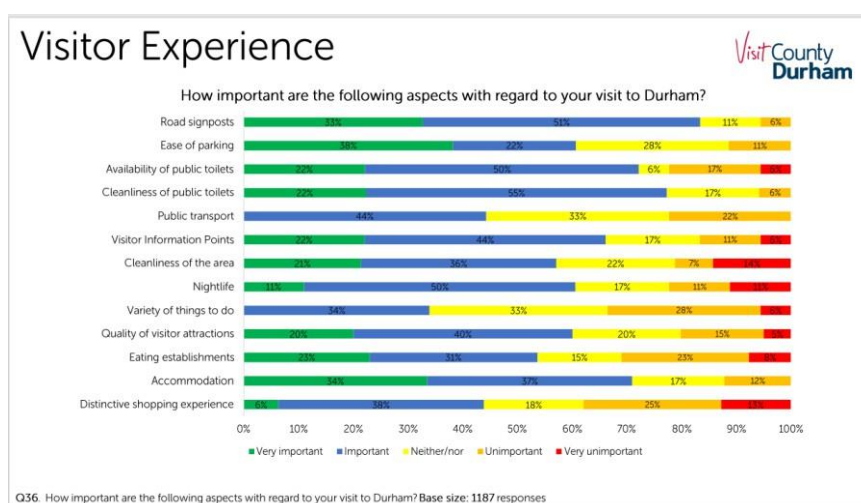
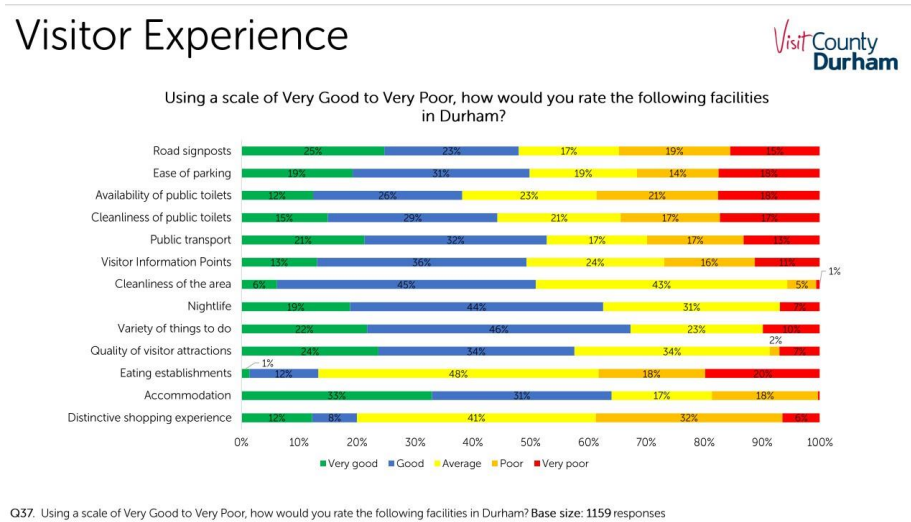


Figure 6: Visitor Experience – Rating Facilities in Durham



Gap analysis table

Gap in offer	Impact
Accommodation - lack of variety in accommodation type, quality and range.	Less competitive accommodation is a contributing factor to the static o/n stay figures
City Centre visitor attractions - other comparable cities have a cluster of more high profile attractions that Durham City	Effects the city centre brand and attractiveness to key markets
Family friendly attractions – There is a range of family friendly attractions available, and more are being developed, but competition is growing all of the time in this market, and CD has a way to go before it gains a reputation for being a family friendly destination	Reduces the opportunity within this lucrative market
Conference venues - promoting the advantages of a rural conference offering, plus the new conference redevelopments are improving the offer for businesses but this is not proportionate to the opportunity of this core segment – especially at the mid-large conference level	Reduces opportunity for growth
Retail offer – Consumers are looking for distinctive retail offers (out of town complexes/independent shop etc). CD currently has a gap in its retail offer, with more standard high street shops, few independents and complexes	Reduces opportunity for increasing spend
F&B offer – A F&B strategy has been developed, with strategies to strengthen key areas , such as the local produce messaging. But CD is still	Reduces opportunity for o/n

lacking the choice/range/quality (especially at high end) that is needed in order to cater for the range of markets it is targeting	stays, spend and brand development
Evening economy – issues such as early closures of F&B establishments and lack of dedicated evening events /destinations makes the evening economy seem quiet in comparison to other cities	Instrumental to increasing o/n stays, and developing a year round offer
Gardens, parks and properties – Landscape and position as rural idyll is one of the cornerstones of the CD offer, however there are few formal gardens or managed properties that have the scale or impact of the neighbouring destinations . The developments (Auckland Walled Garden) are very welcome, but more is needed	Means CD doesn't benefit from huge number of potential National Trust & English Heritage members
Events and sport – CD reputation for cultural events (due to CoC) is growing, however more can be done to fill the gaps in the event calendar with rural events (e.g. agricultural shows), that – if done at scale – can be huge drivers of footfall, as well as brand reputation. Similarly, an increase in sporting events can support the CD targets. There are a number of good country sports offers available (especially for river fishing), but they are not always showcased in a way that is accessible to the visitor	Reduces the opportunity for stand out moments in the CD events calendar
Transport - there is a county wide issue with transport, with driving being the most accessible way to travel around. This hugely influences the type of visitor that can visit CD and the length of time they may want to stay	Poor connectivity hugely impacts the accessibility of the area
Visitor service / public realm - With growing emphasis on end-to end visitor experiences, accessibility, international visitors and sustainability, CD has some gaps in its ability deliver excellent customer service and a forward-thinking plan for the public realm	Inability to respond directly to the needs of every visitor

3.3 NATIONAL AND LOCAL POLICY CONTEXT

i) National Priorities: VisitEngland/VisitBritain

The government has refreshed its approach to DMOs and their role in the COVID-19 recovery and Levelling Up objectives (specifically Living Standards and Pride in Place), following an independent review by Nick De Bois in 2021. Among other things, the review set out to address long-held concerns around structure, funding and fragmentation with 12 recommendations for government, DMOs/LVEPs, and local government. The government has agreed and/or implemented the following which will inform Visit England/VisitBritain's strategy and County Durham's new plan.

For Government:

- A new accreditation system/national portfolio for high-performing Local Visitor Economy Partnerships (LVEPs) to replace DMOs, managed by VisitEngland. LVEPs will become the primary focus for engagement for government and arms-length bodies.
- A tiering model with multi-year core funding (pilot awarded to North East DDP) to increase activity, address challenges (e.g., skills) and encourage private sector investment.

For LVEPs:

- A greater focus on collaboration across geographies, public and private sector.
- Diversified income streams and shared best practice (part of accreditation).
- Ensuring staff skills and expertise are updated and relevant (e.g., digital, international travel), which VisitEngland will continue to drive through its business support activities.
- Representative and diverse boards of governance – communities, businesses and visitors.

Collaboration is also mentioned for, public/private/community partnerships which support co-designed policymaking, and Devolution Deals.

ii) North East England: Tourism Strategies

Local authorities in the North East demonstrated effective local governance and action during the COVID-19 pandemic, which has laid the foundation for their proposed Level 3 Devolution Deal with government, currently subject to ratification and statutory requirements. County Durham will lead for culture, tourism and the visitor economy, including:

- Developing a local cultural framework: Supporting the visitor economy as well as community development (pride, wellbeing), young people (opportunities, skills) and investment.
- Funding: Alignment, joint investment and strategic collaborations in the region.
- Strategic alignment with other programmes and investment (e.g., Culture and Creative Zones, High Street Heritage Action Zones such as Bishop Auckland).
- Strengthening the film and media sector with relevant stakeholders.
- Delivering future national and international events.

The North East has also secured the £2.25m 3-year pilot Destination Development Partnership. The Government has outlined that funding cannot be used for marketing and instead for developing the regional tourism ecosystem. The core outcomes are:

- Growth: 6% per annum for period of the DDP and a 10-year target of growth from £5.2bn (2019) to £10.33bn.
- Best Practice: Create a pilot that publicises best practice and shared learning, particularly on overcoming fragmentation, and in turn creating a model that can be easily replicated by other LVEPs.
- Monitoring and Evaluation: Working with VisitEngland/VisitBritain and DCMS to show evidence of impact and success to support wider roll-out.

More specific stretch targets for 2022-2025 concern an increase in overnight visitors (specifically international and business event visitors), business events (rural, convention bureaus and collaborations with higher education), employment and jobs, capital investment and business growth and support for SMEs (focused on key supply chains like conference organisations). These are not necessarily functions of the DDP but of local and regional government, including the devolution deal.

The DDP is set to be governed by an interim partnership board and working groups with NewcastleGateshead Initiative being the accountable body, working alongside Visit County Durham and Visit Northumberland. The individual LVEPs will nevertheless continue to be funded by the respective local authorities and work to promote and market their own brands but with a view to greater collaboration.

iii) Local Priorities: Council Plan and Inclusive Growth Plan

County Durham aims to increase the number and quality of jobs in an inclusive, green economy by 2035 and makes particular reference to ‘capitalising on heritage, cultural and natural assets to grow the visitor economy’ and the role of place-branding to attract visitors and new residents. The strategy is based on 5 principles: People, Productivity, Places, Promotion and Planet – the last is cross-cutting and concerns green growth.

The DMP will support the delivery of these principles and particularly *Promotion* of the county, assets and opportunities via: branding and place-marketing; a year-round visitor economy with events and infrastructure; and enhancing the cultural and creative industries. The visitor economy is also identified as a major employment sector under *Productivity* and will contribute to and benefit from improvements to *Places*.

More specific ‘early actions’ include: the **County Durham Pound initiative**, **Durham 2025 cultural programme**, cross-partner **MOU to develop the Creative and Cultural Industries** (including the BBC), **connectivity strategy** (physical and digital) and repurposing vacant high street spaces as ‘**Place Labs**’ for creative enterprise and public engagement.

3.4 PRIORITIES FOR COMMUNITY AND ENVIRONMENT

Within the wider Council Plan to 2035, the DMP supports core themes around environment and people.

Priorities include supporting the skills and training opportunities for the sector with our partners, to be able to provide sustainable jobs and support year-round tourism which will ensure a range of attractions and areas benefit from visitor spend. Cultural events are becoming more and more centre stage for both residents and visitors throughout the year and serve to highlight local stories. A further priority will be supporting digital development for the sector, building on and animating our rural offer (including food) and refreshing our place marketing brand to improve our place for the benefit of both tourists and residents.

The post-COVID period has seen a real increase in interest for outdoor access, including events such as Dark Skies tourism and take up for new rural and urban trails such as the Northern Saints Trail. Our ambition is to further promote the outstanding offer for health and wellbeing for locals and tourists and develop a

responsible and sustainable approach to tourism, both in terms of environmental responsibility and business viability. This supports the County's plans to create a physical environment that contributes to good health, achieves a carbon neutral county by 2050, reduces the impact of pollution on our environment, and protects and sustains our natural environment for the benefit of future generations. Further investment in ensuring viable sustainable green public transport around the region is outside the direct scope of the Plan but is integral to its success, as is further developing walking and cycling routes in the region to make the most of the huge array of natural assets. Increasing the proportion of overnight visitors will also be better for the environment, the tourism business sector and local employment.

3.5 CONSUMER TRENDS

Consumer behaviours are ever-changing and since COVID-19 there has been a noted societal shift in leisure time booking patterns and consumer habits. Research shows that key trends to be considered are:

- Solo travellers: Historically associated with the 'free and easy mini breakers', solo travel is now trending with a much broader ranging demographic (and many more 50+) taking breaks alone in the UK and abroad.
- Work/leisure travellers: A post-COVID phenomenon, there is a rise in individuals working from a totally remote location where they also are holidaying. Providing an offer that caters for this hybrid approach to work and leisure will be key.
- Shifts in family market: Providing multi-generational family experiences has been a rising trend since before lockdown. This is coupled with growing emphasis on providing 'maximal experiences', catering for families who want good value, full days-out - with a variety of attractions, adventures, and experiences all in one visit.
- 'Edutainment': A growing trend for families, but also a key market opportunity for adults, with huge growth in learning events, talks and hobbyist courses.
- Sustainable, authentic experiences: People are looking to make a positive impact during their travel and there is a demand for destinations not only to prove their environmental credentials, but also to provide authentic sustainable experiences.

In County Durham we have seen the following trends:

- Shorter booking periods, with bookings made on average 1 month in advance (previously 3 months).
- Awareness of the area from a wider national audience with a growth in visitors from Yorkshire and the North West of England.
- Rise of annual passes, so evidence of a growing number of repeat visits.
- Effects of the cost-of-living crisis, with feedback that value and affordability is now key.
- Rise in social media for sourcing information.

These new trends provide County Durham with growing market and product development opportunity. However, all new consumer opportunity needs to be considered alongside the other major trend in the visitor economy – namely the speed of digital adoption and innovation. Currently, the whole visitor economy is affected by the speed at which digital channels are changing. New payment channels are opening up, 3rd party digital affiliate sites are growing in influence, usage of AR & VR is expanding, and visitors are expecting a seamless digital experience from the planning stage right through to the real-time visit. Visit County Durham will take a leadership role in supporting businesses to navigate this changing digital and consumer environment and has incorporated these trends and developments into its plan.

SECTION 4. WHERE WE WANT TO BE

4.1 WHAT OUR COMMUNITIES WANT TO SEE

As part of the preparation for the new plan, we held a stakeholders' conference in 20202, ran several additional sessions offering stakeholders the opportunity to co-create our vision, undertook a full stakeholder survey in early 2023 and a series of targeted interviews. All of this consultation has given us a detailed picture of where our stakeholders want us to be by 2030 and the wider strategies and partnerships our plan therefore needs to reference.

There is an opportunity now to make a step change for tourism in County Durham, both through the range of new and enhanced activity and attractions coming onstream, and the legacy of 2025 City of Culture and the new DDP pilot offering the chance to be ambitious and aim for new and increased markets. There is a desire to look beyond history and fully promote the natural resources in County Durham and its wonderful offer for wellbeing, green and family tourism. There is acknowledgement of the ongoing need to ensure there is investment in quality bedspace and F&B attractions right through the county. This is being developed by a number of key private sector operators who are keen to position County Durham as an important year-round destination for rural-based business and events.

Nearly 60% of our survey respondents are planning further investment and expansion in their businesses and are keen for VCD to act as the data information and marketing hub to help promote the county to new markets, particularly family audiences. It's acknowledged that this means a refresh of the place brand and a concentrated effort by attractions to support skills development. The work of the DDP will support our aims to establish County Durham as a must-visit destination for tourists wishing to explore the North East.

4.2 PIPELINE DEVELOPMENTS

There are a range of exciting developments in the pipeline for the County, ranging from significant capital investment (with new conferencing, hotel, spa, play, garden, trails, museum and other facilities coming onstream in the plan period) to a number of significant events, exhibitions and wider programmes to draw visitors and publicity to the region. These include the expansion of Locomotion and the celebration of the bicentenary of the Stockton Darlington Railway in 2025, the opening of The Rising at Castle Raby, the expansion of Beamish, the opening of the Faith Museum and the further development of the gardens and landscape at Bishop Auckland.

(VCD to confirm whether to add any other specific developments here or £ figures for potential investment?)

Whilst the priorities for the wider North East under the new Devolution Deal are still to be defined, County Durham's ambition to act as the lead authority for the region in terms of visitor economy and culture offers a big opportunity to further promote the wider region on a national and international stage, as well as significant events and activities in the County itself.

4.3 COMPETITIVE LANDSCAPE

Cost of living will remain a significant challenge for at least the initial part of the plan lifecycle and means that County Durham more than ever needs to be able to articulate its unique offer persuasively and demonstrate strong value for money, for local, regional and national visitors. Improved approaches to public transport in a greener context are needed, as are increases to the range and style of accommodation and F&B provision throughout the county and an ongoing investment in service skills.

Alongside these key developments, there are gaps in our current offer that still put County Durham at a disadvantage when compared to other destinations. They include a lack and range of visitor accommodation, limited gardens and public spaces, a weak early evening offer to tip day visitors into overnight stays and the overall volume of family attractions compared to competitor destinations. Other destinations are also investing heavily in digital support, both to make booking easy and to enhance attractions themselves.

All of the strategic priorities for the plan will need a clear link to the county and region's investment plans in order to retain existing visitors, attract new markets and increase dwell time.

4.4 VISION AND VALUES

Developing our vision has been a critical part of the process of creating a new Destination Management Plan. We undertook a wide range of exercises with stakeholders to understand what excites them and what priorities they have over the next few years. Our vision statement makes clear the role we see Visit County Durham playing as we partner with other organisations who are passionate about sustainably growing our visitor economy.

Our vision is to create the conditions for our residents, businesses, and the environment to benefit from sustainable growth in our visitor economy. By supporting and marketing our distinctive heritage, landscapes, and warm welcome we will grow both day and overnight visits and make County Durham a compelling visitor destination.

SECTION 5. HOW WE'LL GET THERE

5.1 PRIORITIES

Our priorities are driven by our vision for Durham's visitor economy and are designed to deliver three core outcomes:

- 1. Increased Visitor Retention:** We want existing visitors to County Durham to keep coming back and maintain or increase the frequency of their contribution to our economy.
- 2. Increased Visitor Acquisition:** We want to attract new visitors to County Durham by understanding and capitalising on new market trends, improving our product in line with these and creating impactful storytelling.
- 3. Increased Visitor Dwell Time/Spend:** We want to increase the number and proportion of overnight stays and the length of those breaks, as well as increasing visitor spend.

We have used extensive research, consultation and market insight, together with our Theory of Change (see Appendix 4), to develop five **priority pillars**. These are linked to clear actions (see table in 5.4) and evaluation (see Section 6) and will enable us to support the delivery of our three core outcomes. They form the heart of our plan to 2027.

Priority 1: Provide an end-to-end experience which is high-quality, welcoming and inclusive

Rationale

- The warmth and personality of our welcome is a USP for County Durham and a key differentiator for our visitor economy. Ensuring that it becomes more inclusive and international in its approach will make us best of breed.
- Visitor expectations for a seamless experience, from booking to real-time visits, have been raised in the digital age for travellers regardless of market type. Accessibility and ease of experience is now critical.

Objective

Experience a significant increase in the perception of quality of the County Durham visitor offer by existing and new visitors alike.

Success Measure

Raise our scores in the tourism sentiment index from X (202X) to: A (2024), B (2026), C (2028) and D (2030) [VCD team may wish to insert additional breakdown by category here]. We will monitor success by tracking our monthly scores in the Tourism Sentiment index, seeking consistent annual improvements in our scores. Our scores (and those of comparator destinations) will be shared with stakeholder groups to help them understand current levels of service and improve on them.

Markets

All visitors to County Durham will benefit from our high-quality, inclusive experience, but this priority is particularly focussed on retaining or attracting :

- Older visitors (mostly couples) who visit frequently

- Visitors with particular access needs
- Families who demand end-to-end seamless experiences
- International visitors

Priority 2: Promote County Durham with a compelling narrative for external audiences

Rationale

- Our extraordinary landscapes, rich industrial heritage, and thriving cultural scene are vital to County Durham's identity and sense of community, but we believe our story can be told more impactfully. Capturing the essence of brand County Durham will make our initiatives, campaigns, and communications stand out in a crowded marketplace.
- In a hugely competitive digital landscape we need a clear and compelling story to achieve healthy conversion rates and reach new markets.

Objective

County Durham will have a place brand incorporating a visitor story built around our people, and our natural, heritage and cultural assets. Visitors will be able to clearly articulate what drew them to County Durham.

Success Measure

Perception research in 2023 will provide a new baseline (last conducted 2015) for current visitor perceptions and use this to inform our new narrative. We will repeat perception research in 2028 to understand impact over this period. Our objective is to see a significant improvement in performance. Numeric targets will be set once the baseline research is complete.

The 2023 and 2028 Visitor Perception surveys will provide the gold standard mechanism for monitoring success. Given that these cannot be undertaken annually, in the intervening years our objectives for increases in day and overnight visitors and total economic impact (see Section 5.2) will act as proxies for the impact of our narrative externally.

Market:

Better articulating our brand story will help with both new visitor acquisition and retention of existing visitors but will particularly resonate with new opportunity groups trying the destination for the first time.

Target markets are:

- Families
- Experience seekers
- Solo travellers

Priority 3: Develop extended season products and experiences for our visitors

Rationale

- Like many UK destinations County Durham has low shoulder seasons and a peak in the summer months. Our ambition is to support initiatives that flatten this spike with more visits

across the September to April period. This will help businesses manage critical areas such as staffing, supply chains and cash flow.

- Changes in visitor habits and desires post-Covid present emerging opportunities for new approaches to attract visitors outside peak season.

Objective

County Durham will be an increasingly popular visitor destination for both UK and international visitors with the greatest growth in visitor numbers coming outside the peak Mar to August period.

Success Measure

We will see a greater increase in percentage terms in monthly destination performance metrics in March, April, September and October each year than in May to August.

Monthly occupancy and attraction numbers provide a strong objective basis for measuring success in this Priority. We are looking to see statistically significant improvement in shoulder month performance (esp March, April, September, October) from 2025 over 2024 data. Destination Performance data is already widely disseminated and this will continue.

Market

We will continue to interrogate data to understand the off-peak visitor profile. We believe markets that will benefit from year-round products are:

- Country loving traditionalists (mostly retirees) who have regular breaks out of holiday season.
- Experience Seekers, driven by cultural and other events held out of peak season.
- Families with school-age children taking breaks during Spring and Autumn half term.
- Post-Covid opportunity groups including 'workcation' breaks, wellbeing tourists and edutainment visitors.

Priority 4: Develop eye-catching, authentic product meeting consumer needs

Rationale

- Over the past three years, the whole sector has learnt that being agile and responding to new trends, data, and insight is critical for resilience.
- There is growing demand for consumer experiences that are authentic, sustainable, memorable, and target more nuanced customer profiles.
- Our data, insights and new Destination Development Partnership give us new abilities to enable our stakeholders to create products that are responsive to consumer needs.

Objectives

We will grow the value of our Visitor Economy to £1.74b by 2030 by offering outstanding tourism products that meet visitors' needs.

Success Measures

1. Achieve target increase to total economic impact of £1.74b by 2030 (and hit annual targets for economic impact in all intervening years) demonstrating clear consumer recognition that County Durham's offer meets their needs.

2. Improve Advertising Equivalent Value (AEV) as reported by our quarterly press and PR statistics by more than inflation each year from 2024, demonstrating increased media interest in County Durham product

Market:

Product development will continue to be targeted to specific consumer profiles using the VisitBritain segmentation but it is important for us to ensure we are being as granular as possible when looking at market opportunities. ‘Catch all’ segments are too broad to accurately serve the needs to today’s diverse consumer and our language must be nuanced for new trends, needs, and market value. Sub-groups that may further inform our product development are:

- Returners - country loving traditionalist, older couples, cultural enthusiasts.
- Families - adventure, multi-generational, and cultural travellers
- Lifestyle traveller - solo travellers, workcation, edutainment, and health
- Younger travellers – Generation Z, students, and experience seekers

Priority 5: Support businesses to develop performance, resilience and profit

Rationale

- In a sector with a high proportion of micro and small businesses core business support is critical to sectoral success.
- The extensive research work carried out for County Durham’s City of Culture bid showed the vital importance of building a successful business base with skilled staff in improving prospects for the County and region.
- Consultation work done for this plan has reiterated a key stakeholder desire for partnership between VCD and a range of larger and smaller businesses in this area.

Objective

Create a visitor economy business base which is more resilient, employs more people and is more profitable.

Success Measures

1. Increase the number of tourism businesses in County Durham to **XXXX** by 2030.
2. Increase the number of jobs supported by the visitor economy to 21,200 by 2030.
3. Our work with partners (particularly through the DDP) results in additional funding and better take up of business development and skills development services for visitor economy businesses in County Durham (measurement mechanism to be developed with DDP partners)

Market

Successful visitor economy businesses with good profitability and resilience benefit all our visitors by driving a stable, high-quality offer. However, they particularly benefit local communities through the creation of a more sustainable local economy and our stakeholders by providing the skills and tools they need to run profitable, sustainable businesses.

5.2 GROWTH TARGETS

Please note, targets are highlighted in red and confirmed numbers in black.

Annual growth				25%	20%	5%	5%	5%	5%	5%	5%	5%
Year	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Day Visitor (m)	18.52	10.75	14.39	17.94	21.53	22.60	23.73	24.65	25.88	27.17	28.53	29.96
Overnight visitor (m)	1.61	0.64	1.38	1.77	2.13	2.24	2.35	2.74	2.88	3.02	3.17	3.33
Proportion of overnight visitors	8%	6%	9%	9%	9%	9%	9%	10%	10%	10%	10%	10%
Total visitors (m)	20.13	11.39	15.77	19.71	23.66	24.84	26.08	27.38	28.75	30.19	31.70	33.28
Economic impact (£m)	£955.00	£507.00	£826.68	£1,033.35	£1,240.02	£1,302.02	£1,367.12	£1,435.48	£1,507.25	£1,582.61	£1,661.75	£1,744.83
International visitor numbers (m)	0.60	0.06	0.16	0.39	0.71	0.75	0.78	0.82	0.86	0.91	0.95	1.00
International spend (£m)	£28.65	£2.54	£8.27	£20.67	£37.20	£39.06	£41.01	£43.06	£45.22	£47.48	£49.85	£52.34
Total international visitor overnight stays (m)	0.05	0.00	0.01	0.04	0.06	0.07	0.07	0.08	0.09	0.09	0.10	0.10
Proportion of international visitors	3%	0.50%	1%	2%	3%	3%	3%	3%	3%	3%	3%	3%
Employment (FTEs)	12,133	6,794	10,063	12,579	15,095	15,849	16,642	17,474	18,347	19,265	20,228	21,239
Direct	9,720	5,477	8,111	10,139	12,167	12,775	13,414	14,084	14,788	15,528	16,304	17,119
Indirect	2,413	1,317	1,952	2,440	2,928	3,074	3,228	3,390	3,559	3,737	3,924	4,120

5.3 TARGET MARKETS

We want to have a responsive, flexible way to categorise and understand our market. One that can inform our decision-making, our approach to allocating marketing spend and shape the way we evaluate success.

Using the Visit England segmentation, our existing research, and insight gathered from current consumer trends especially those post-covid, we will be segmenting our target markets into **two groups**.

i) GROUP 1. High Value & High Awareness

Profile

- High value: Either likely to have increase spend, likely to be more frequent in their visits, likely to have longer dwell time, or likely to be a group that is important for policy or DDP development.
- High Awareness: They already know County Durham through a previous or as a past marketing target so likely to have a lower £ per conversion.

Their Needs

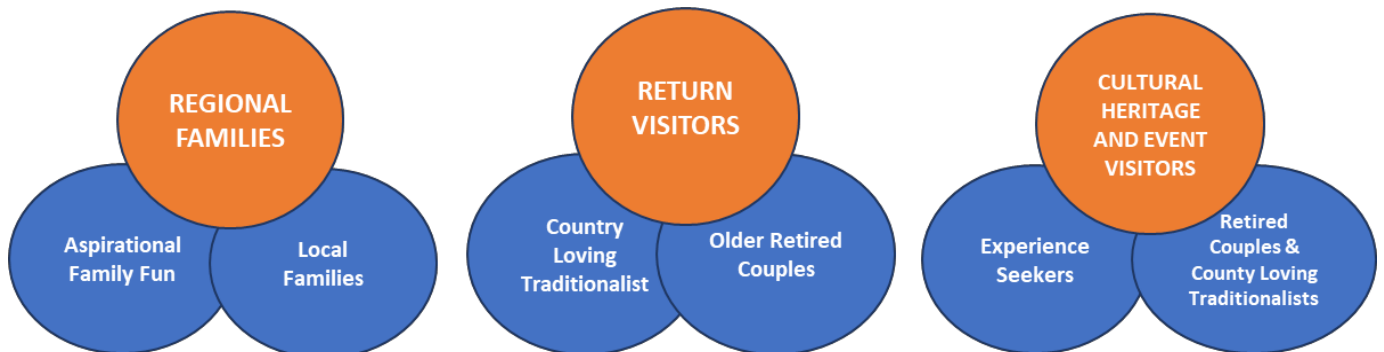
- Quality offer, good-tailored visitor experience, regular relationship building.

Our Approach

These groups are a priority as they are key to delivering 2 of our 3 outcomes (increase visitor retention and visitor dwell time). They are also a particular focus in priority 1 (welcome), priority 4 (product development) and in some cases priority 5 (all-year round).

Group 1 segments are detailed in Figure 7 below.

Figure 7: Group 1 Market Segment



ii) GROUP 2. High Value & Low Awareness

Profile

- High value: Either likely to have increase spend, likely to be more frequent in visits, likely to have longer dwell time or likely to be a group that is important for policy or the DDP.
- Low Awareness: Either we have no evidence to demonstrate that they are very aware yet of County Durham through previous visits, or they are a new group to have emerged post-COVID so haven't been specifically targeted before. They are likely to have a higher £ per conversion.

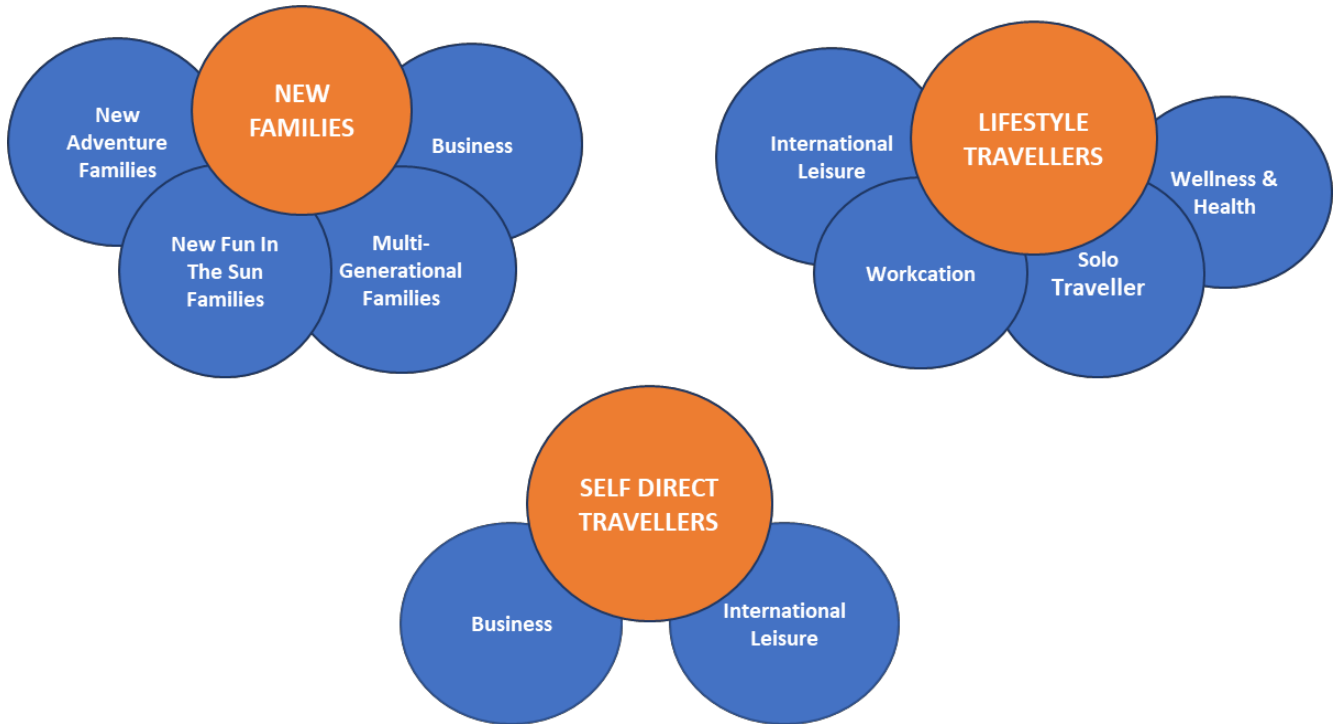
Their Needs

- Strong brand messaging, visibility of offer through multi-platform marketing, product that suits their profile.

Our Approach

These groups are a priority as they are key to delivering 1 of our 3 outcomes (increase visitor acquisition). They are also a particular focus in priority 2 (brand development), and in some cases priority 5 (all-year round).

Figure 8: Group 2 Market Segment



5.4 ACTION PLANS

What	Related Priorities	Who	Key dates
Industry training action plan, focused on inclusive welcome, including international.	1, 5	Plan coordinated by VCD and local college provider with extensive sectoral input	Draft plan: 2024 Training delivered from 2025
Durham County Council Tourism Working Group support the development of the County's role as the sectoral lead for tourism and culture in the North East devolution deal.	2, 5	VCD, Durham County Council	From 2023
Council Tourism Working Group to support inclusivity improvements.	1	VCD, County Council, local businesses	Ongoing
Ensure inward investment opportunities in the visitor economy are of high quality, accessible, and sustainable in value. Provide investors with data to show VCD role as an enabler to help them realise full potential.	1	VCD, NE LEP	Ongoing
Refresh place and destination brands	2	VCD with extensive sector input	2024
Develop a clear narrative and standout proposition everyone can use and ensure VCD Board is able to advocate to key selected audiences via agreed channels	2	VCD	2023
Develop communications plan for business market at regional, national and international level. Include high quality comms for our advocates and key examples of key success by individuals and businesses	2	VCD	2024
Plan for promotion of 'Only in Durham' products to support local suppliers as part of place branding work	2	VCD with key partners	Identify key partners – 2024 Deliver – from 2025
Continue to promote and encourage development of accessible and family friendly product	2	VCD in partnership with larger providers/attractions	2025
Include, encourage and support the development of working groups through the DDP, with a focus on shoulder months in markets including wellbeing, edutainment, workcation, and culture (including events)	3	VCD, DCC Events team, partners	Group remits – 2023 Convene groups - 2024 Delivery – from 2024
Align with Culture Durham research work to prioritise Capital of Culture legacy	3	VCD, Culture Durham	2024
Plan and deliver regular workshops and ways to promote the research dissemination role of VCD, particularly as DDP plan develops	3	VCD, partners, DDP	2023
Audit existing thematic product (e.g., health and wellbeing, outdoor leisure) to support theme development as nationally distinctive walking destination	4	VCD	2023
Define which key trends to build on (e.g., health) and animate rural marketing	4	VCD	Ongoing
Work with Council and sectoral partners (e.g., accommodation providers, cathedral, museums) to develop critical mass of attractions in Durham City	4	VCD	2026
Continue to lobby (to both relevant public and private sector bodies) for improved high-speed broadband connectivity in rural areas	4, 5	VCD, DCC and partners	Ongoing
Continue to lobby (to both relevant public and private sector bodies) for improved public transport connectivity across the county with a particular emphasis on route frequency and later last buses suitable for visitor needs.	3, 4	VCD	Ongoing
Support businesses to develop digital presence, joint ticketing and promotions and sharing good practice. Stockton and Darlington 200 th Anniversary in 2025 to be an initial focus for this.	5	VCD and partners	2025
Conduct annual business survey feeding into NE LEP, LA data and UK Government and monitor other key data points (e.g., visitor economy business birth/death rates)	5	VCD	Ongoing

SECTION 6. EVALUATION

We will monitor our success against the 5 priority pillars on a regular basis and disseminate that data and insight amongst our stakeholders.

The main strands of research we collect, commission or take part in are:

- Perception research – every 5 years
- Countywide visitor survey – every 3 years
- Visitor segmentation – every 4-5 years
- Volume and value – annually
- Destination performance (occupancy and attraction numbers) – monthly
- Tourism Sentiment Index – monthly
- How's Business Survey – quarterly

We also report quarterly on a number of key KPIs:

- % change in the number of visitors to the core attractions in County Durham compared to the previous year
- Number of tourism businesses in County Durham
- Number of tourism businesses engaged with VCD
- % increase in number of tourism businesses engaged with VCD
- Press & PR stats (destination and corporate)

Internally we closely monitor performance and ROI of key areas such as:

- Marketing campaign evaluation – quarterly
- Consumer social media (followers, impressions, engagement, reach) – monthly
- Product on consumer website – monthly
- Development enquiries – monthly
- PR activity – value and reach – monthly
- Business and consumer e-comms (database, open rate) – monthly
- Consumer & corporate website performance (sessions, users & pages) – monthly

- Number of paying partners – monthly

The main ways we disseminate this information to our key stakeholders is by:

- Destination infographic – annually
- Destination factsheet – annually
- Visitor Economy View (partner only) – biennially
- Market intelligence round up (partner only)– monthly

SECTION 7. APPENDICES

Appendix 1: SWOT ANALYSIS

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Variety of landscapes and assets; especially strong on amazing collections and buildings in green spaces • Proximity to the rest of the North of England • UNESCO World Heritage Site and UNESCO Global Geopark (although these need to be better exploited) • Supportive local authority that gets things done • Reputation for a warm welcome • VCD – proven success in destination management and partnership building 	<ul style="list-style-type: none"> • Public transport across the area • Knowledge of where County Durham is • Out-of-date images / perceptions • VCD budget and resource constraints • Lack of a range and type of visitor accommodation across the county • Lack of a critical mass of attractions in Durham City, especially for the family market • Current accommodation and F&B offer compounded by lack of skills and talent retention • Digital infrastructure
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • ‘Halo moments’, new assets coming onstream and plans to build on legacy of UK City of Culture bid • Wellbeing/faith/staycation tourism • DDP opportunities to work together/try new approaches • Devolution plans • Film and TV location growth (aligned to Sunderland and Hartlepool Studio plans and BBC NE partnership) • Growing non-local markets especially families and younger people • Tourism voice in the sustainability forum for the region • Clear portfolio of shovel ready investment opportunities 	<ul style="list-style-type: none"> • Lack of political heft in NE consortium • Cost of living affecting visitor markets and investors • Not clearly aligned to wider economic plans (inc. transport and training) or leadership to attract significant new investment • Not enough ambitious investment-ready projects • Fear of change locally (although not in VCD) • Generic issues affecting local businesses and their ability to respond/grow/invest /develop supply chain, manage energy crisis) • Competition for brand visibility with other comparable destinations in area

APPENDIX 2: STAKEHOLDER SURVEY QUESTIONS

In addition to the VCD conference and vision workshops held in autumn 2022, VCD sent an email survey to all its members in February 2023. This generated a total of 69 responses and has been used to inform the future direction of the DMP, supplemented by in-depth interviews with a range of key stakeholders.

Survey Questions

Introduction

Thank you for taking a few minutes to complete this survey. The results will help us to develop a new Destination Management Plan that will increase visits, overnight stays and tourist interest in County Durham and help our county, and our visitor economy businesses to thrive. There's an opportunity at the end to leave contact details so we can send you a copy of the plan when it's finished, and we'd love to stay in touch with you.

1. What would you say are currently are the main barriers or challenges for you in attracting tourists to your business/site/organisation?
2. What do you see as biggest future opportunities to encourage more tourists to the area?
3. Does your business hold events? Yes/No [If YES go to 4. If no go to 5]
4. What key events/programme do you have planned in the period 2023 to 2026? Please give the event name, a brief description, location, the planned dates and when booking will be open (even if only approximate at this stage)
5. Who are the main market segments currently using your business?
6. Who do you hope will be the main market segments for your business over the next five years?
7. Are you planning on running any specific initiatives aimed primarily at tourists (e.g marketing campaigns or partnerships)? Yes/No and segment
8. Do you have any performance targets or projections for tourists in your plans? Yes/No [If YES go to 9. If NO go to 10]
9. Are you able to share what those targets are?
10. Does your business have any plans for significant expansion that might affect tourism (e.g., additional accommodation, new digital offer, new branches)? Yes/No [If YES go to 11. If NO go to 12]
11. Could you tell us a bit about them? For example how many new units of accommodation are you planning to build or what will your new digital offer be? If you are able please let us know when you plan to do this.
12. Anything else you would like to say that will help us create our new destination management plan?

Thank you!

In addition, a number of key partners were interviewed specifically for this plan. Thanks go to:

Beamish

Durham Cathedral Durham

County Council Durham

County Cricket Club Durham

University

Forestry England

Locomotion

National Trust

NewcastleGateshead Initiative

Raby Estates

The Auckland Experience

The Bowes Museum

Ushaw Hall

Visit Northumberland

for their time and feedback.

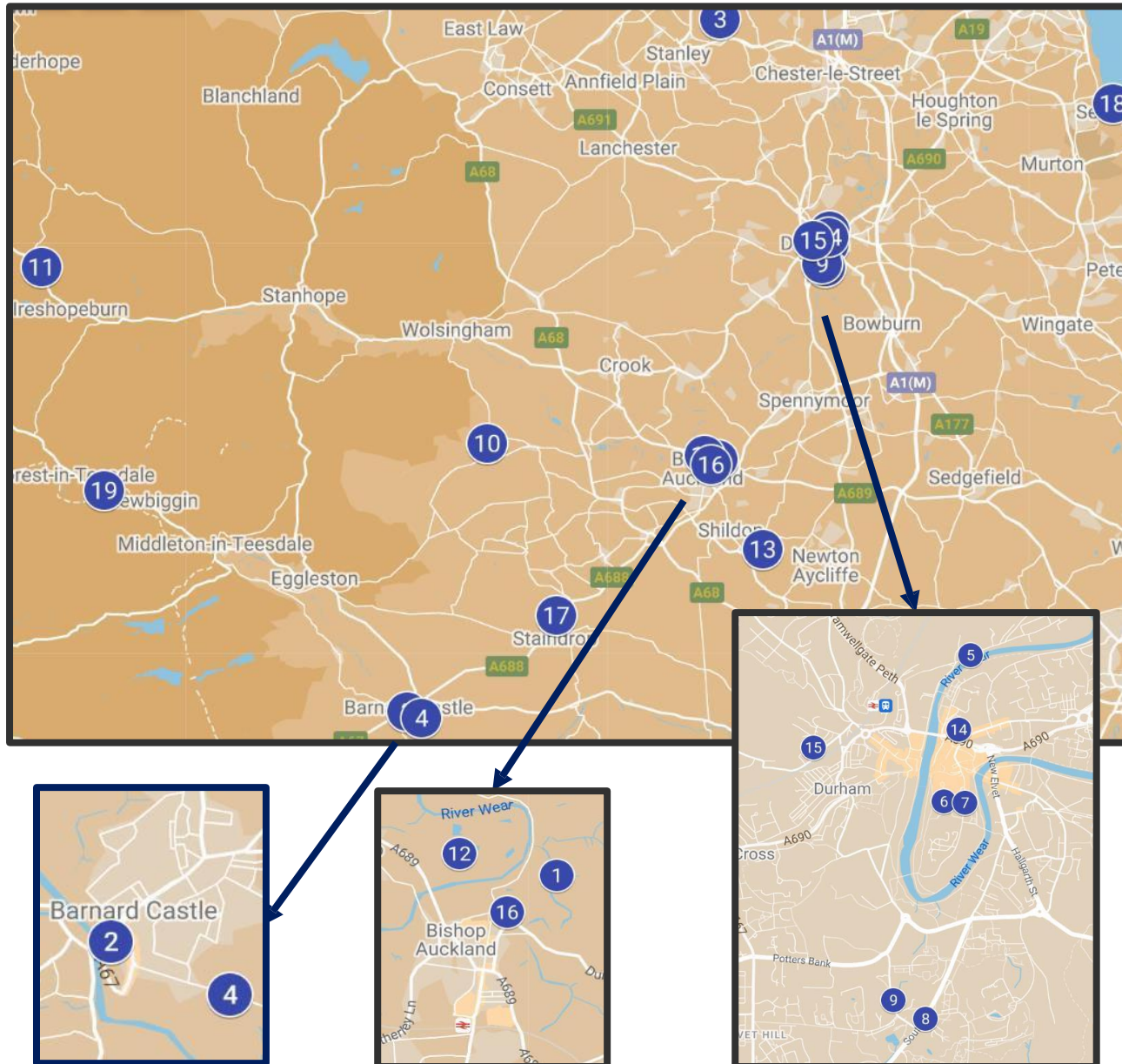
APPENDIX 3: ASSET MAP

See Figure 9.

APPENDIX 4: LOGIC MODEL

See Figure 10.

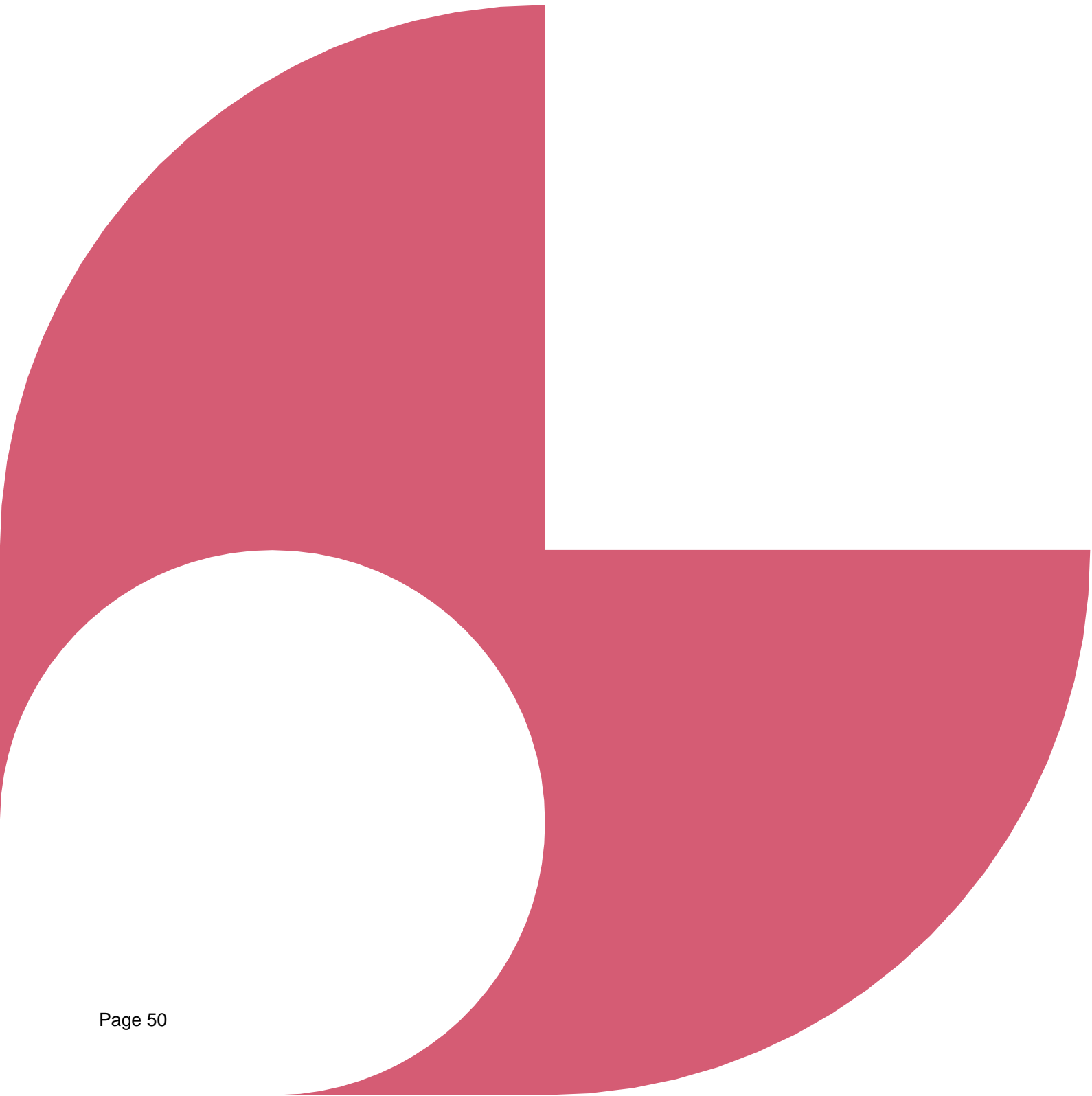
Figure 9: County Durham - "Top 19" Visitor Destination Assets (including physical buildings, natural attractions and events)



- 1 Auckland Castle
- 2 Barnard Castle
- 3 Beamish Museum
- 4 The Bowes Museum
- 5 Crook Hall and Gardens
- 6 Durham Cathedral and Castl...
- 7 Durham Museum and Herita...
- 8 Durham University Botanic G...
- 9 Durham University Oriental ...
- 10 Hamsterley Forest
- 11 Killhope Lead Mining Museum
- 12 Kynren
- 13 Locomotion
- 14 Lumiere
- 15 Miner's Gala
- 16 Mining Art Gallery - Bishop A...
- 17 Raby Castle
- 18 Seaham Beach
- 19 High Force Waterfall

Figure 10: Visit County Durham Destination Management Plan (2023-30) - Logic Mod





Durham Destination Management Plan 2023-2030

Michelle Gorman



Durham Destination Management Plan 2023-2030

The Destination Management Plan (DMP) is:

- the destination's plan which converts county, regional and national market research and strategies into a county-based plan to grow the county's visitor economy
- for all organisations and individuals in County Durham, and national bodies to help them understand what is being done, what needs to be done and how they can contribute to our success
- compiled and managed by Visit County Durham in collaboration with the county's tourism industry and a broad range of stakeholders and partners

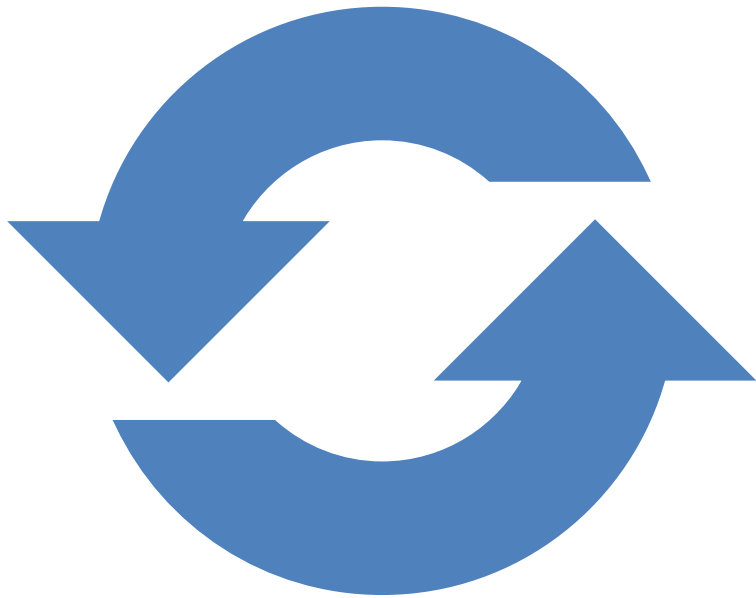
Durham Destination Management Plan 2023-2030

- The county has had a Destination Management Plan since 2006. Two major revisions since, in 2012 & 2016
- 4th edition delayed due to Covid (2021-2025), the next revision will span 2023-2030
- Identifies destination priorities and specific actions for up to 5 years with longer term ambitions up to 10+ years ahead
- Monitored by the VCD Board. Reviewed annually and refreshed as needed. The Visit County Durham team manages the plan in collaboration with key stakeholders and partners.



Destination Management Plan 2016-2020 refresh

Time to refresh



COVID-19 global impact

- The political, funding and stakeholder environment has changed significantly since the plan was last produced in 2016.
- Some of the ambition in the previous plan has been realized.
- Stakeholders have changed and more are now involved in supporting the visitor economy.
- The national framework has been refreshed so the time is right to reassess Durham's plans.

Development and consultation

- The Destination Management Plan is developed using the principles of a sustainable development model known as **VERB**
(**V**isitor, **E**nvironment, **R**esident, **B**usiness)
- In partnership with key partners and stakeholders:
 - Visit County Durham Board
 - Regeneration, Economy & Growth Management Team
 - DCC Tourism Internal Working Group
 - E&SC/E&E Scrutiny Committees
 - Visitor economy businesses
 - Local, regional and national stakeholders/partners inc. Visit England
 - County Durham residents (surveys and consultations)

2016-2020 priorities

1. Lengthen the amount of time that visitors spend in the county
2. Improve the quality of the visitor experience post arrival
3. Differentiate Durham for external audiences
4. Attract new staying visitors to the county
5. Retain existing day visitors to the county
6. Address seasonality
7. Develop new product and support existing product strengths
8. Improve SME and micro business performance



Five priority 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

Visitor focused outcomes

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.

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.

INCREASED VISITOR RETENTION

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



Unique history and heritage.

Outstanding cultural/natural assets.

Strong/experienced partnerships.

Supporting infrastructure.

Inclusive Economic Strategy



20



23



We are on a journey to
regenerative destination
management with the

2023 GDS-Index

See our sustainability contributions
on www.gds.earth/index



GLOBAL
**DESTINATION
SUSTAINABILITY**
INDEX

Monitoring and Evaluation

- Approved and monitored by the VCD Board in collaboration with key stakeholders and partners.
- An annual evaluation of the plan will be undertaken to assess the effectiveness and review progress against objectives, updated as required.
- As a Local Visitor Economy Partnership, progress will be monitored through Visit England's Growth Plan process.
- Individual working groups or task groups will also be set-up to develop ideas into projects.



Questions and feedback

