

Culture & Visitor Economy

Scrutiny Committee 14 April 2023

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Agenda



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



Highlight the key aspects of the developing destination management plan



Provide insight into the 2022 visitor survey

Service Overview

Culture

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

FTE
202.12

Tourism

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

FTE
13.49

Opportunity context

New destination management plan

Destination development partnership

Outdoor & Environment

Inclusive economic strategy

City of culture legacy

Priority places

BBC strategy/NESIP



- **DuBois Review & DCMS Response**

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

An Inclusive Economic Strategy



Inclusive in development
Through the Big Econ-versation



Inclusive and green in design
Going beyond a traditional economic strategy



Inclusive in delivery
Delivered as a partnership

Delivery Framework - The 5 “P’s”



Promotion - priorities

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

Priorities

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



County Durham – opportunities

Major employment sectors

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



25,000
jobs in advanced
manufacturing



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

Key opportunity sectors for growth

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



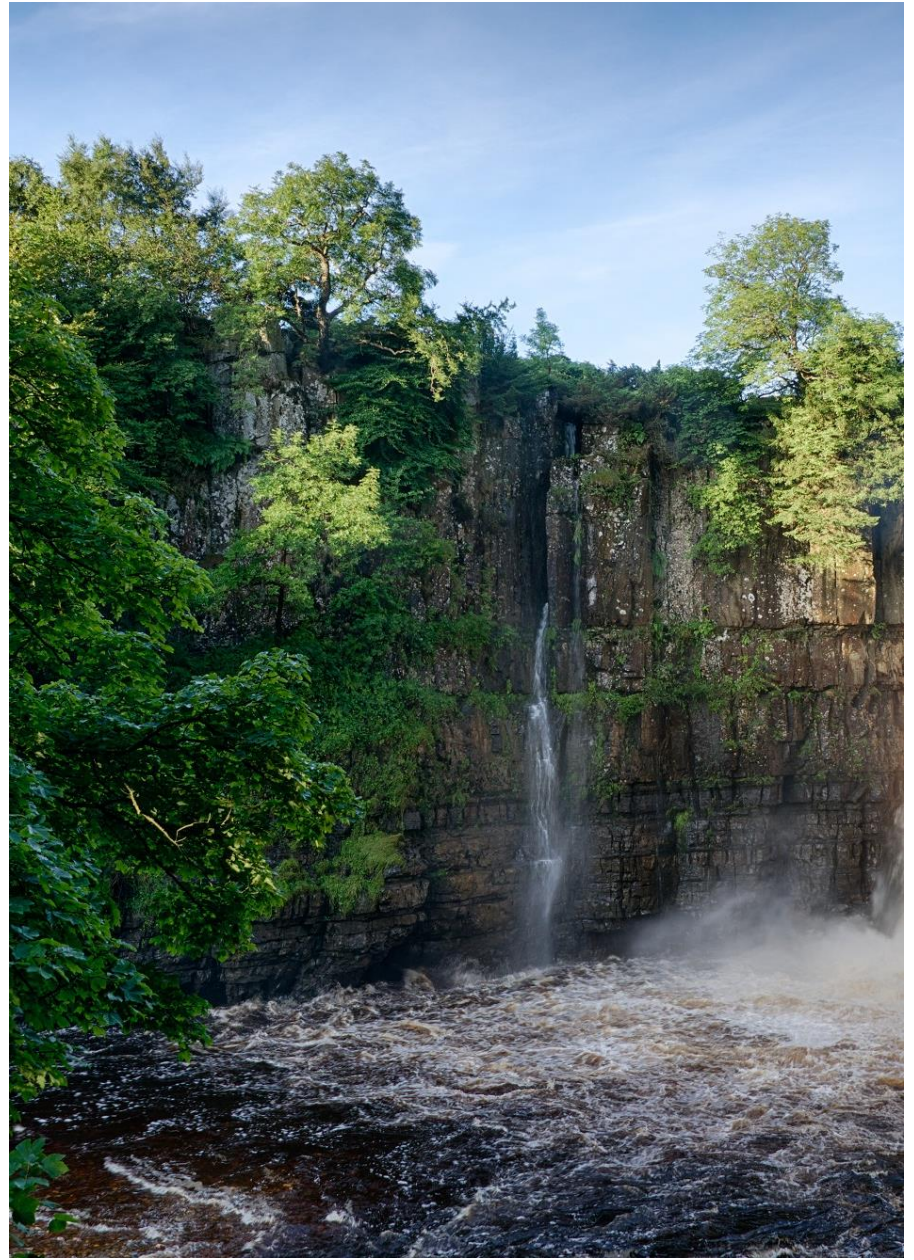
10,000+
jobs in tourism & supply
chain



16m visitors and
£827m spend



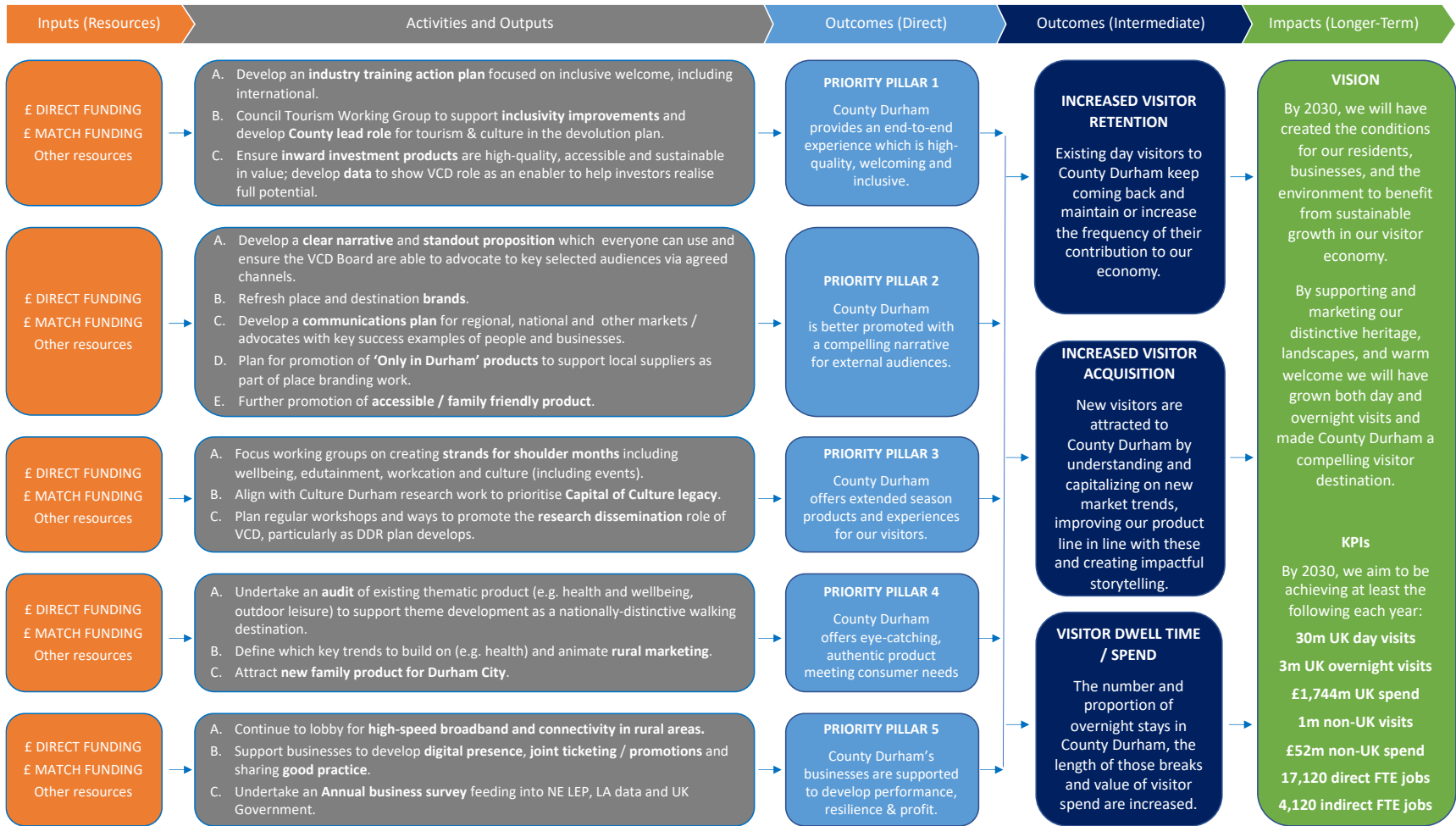






Destination Management Plan





Unique history and heritage. Outstanding cultural/natural assets. Strong/experienced partnerships. Supporting infrastructure.



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



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



County Durham offers extended season products and experiences



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



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

INCREASED VISITOR ACQUISITION

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

INCREASED VISITOR RETENTION

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

VISITOR DWELL TIME / SPEND

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

Destination Development Plan 2023-2026

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



Questions & Observations

Visitor Survey 2022 Results



Supported by



Methodology

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



Key objectives

To understand the following;

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



Demographics

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

Visitor Profile

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



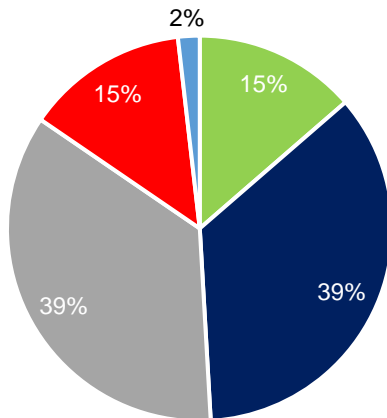
Overnight visitors

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

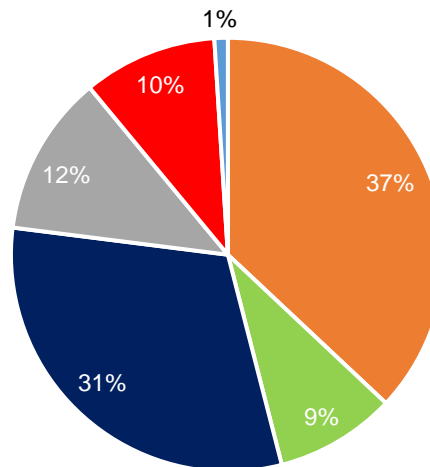
Average Spend

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

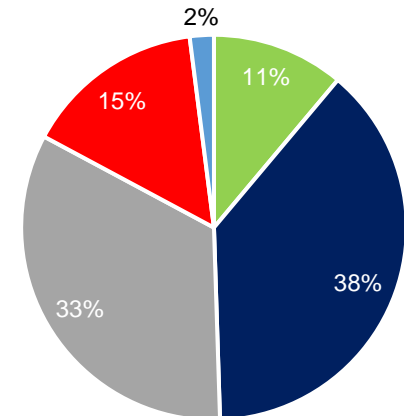
Local Day Visitors



Overnight visitors



Non local day visitors



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

Average spend for day and overnight visitors

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

Researching the Destination

Durham Pocket Guide

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



Sources of Information



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

Visitor activity

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

Visitor Experience

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

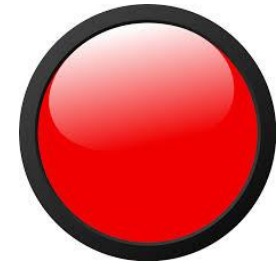
Visitor Satisfaction



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



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



- Availability of public toilets
- Distinctive shopping experiences

Any questions?