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



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"

Our ambition: more and better jobs in an inclusive, green economy						
People	Productivity	Places	Promotion			
Enable residents to access economic opportunities and excel in business and their careers	Support local wealth creation and retention	Develop places and infrastructure so that people and businesses thrive	Promote our county, assets and opportunities to businesses, investors, visitors and residents			
Skills levels Barriers to employment In-work progression & upskilling Health and wellbeing	Major employment sectors Opportunity sectors Start-ups & business growth Innovation ecosystem Good business practices	Towns and villages Employment land Physical connectivity Digital infrastructure	Brand & place marketing Inward investment Year-round visitor economy Cultural & creative infrastructure			
Green skills	Green economy Business transition to net zero	Sustainable communities	Green economy cluster			
Planet Reach net zero by 2045 through a just transition that creates good jobs						

Delivered through partnerships

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







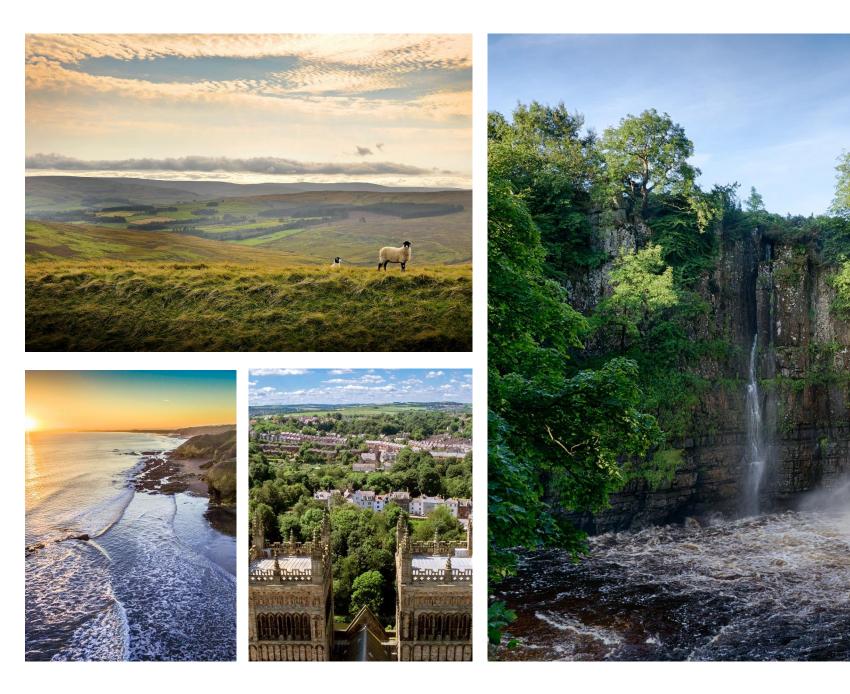














Destination Management Plan



Inputs (Resources)	Activities and Outputs	Outcomes (Direct)	Outcomes (Intermediate)	Impacts (Longer-Term)
DIRECT FUNDING	 Develop an industry training action plan focused on inclusive welcome, including international. Council Tourism Working Group to support inclusivity improvements and develop County lead role for tourism & culture in the devolution plan. Ensure inward investment products are high-quality, accessible and sustainable in value; develop data to show VCD role as an enabler to help investors realise full potential. 	PRIORITY PILLAR 1 County Durham provides an end-to-end experience which is high- quality, welcoming and inclusive.	INCREASED VISITOR RETENTION Existing day visitors to County Durham keep coming back and maintain or increase	environment to benef from sustainable
MATCH FUNDING \longrightarrow C Other resources	 A. Develop a clear narrative and standout proposition which everyone can use and ensure the VCD Board are able to advocate to key selected audiences via agreed channels. B. Refresh place and destination brands. C. Develop a communications plan for regional, national and other markets / advocates with key success examples of people and businesses. D. Plan for promotion of 'Only in Durham' products to support local suppliers as part of place branding work. F. Further promotion of accessible / family friendly product. 	PRIORITY PILLAR 2 County Durham is better promoted with a compelling narrative for external audiences.	the frequency of their contribution to our economy. INCREASED VISITOR ACQUISITION New visitors are attracted to	growth in our visitor economy. By supporting and marketing our distinctive heritage, landscapes, and warr welcome we will hav grown both day and overnight visits and
DIRECT FUNDING	 Focus working groups on creating strands for shoulder months including wellbeing, edutainment, workcation and culture (including events). Align with Culture Durham research work to prioritise Capital of Culture legacy. Plan regular workshops and ways to promote the research dissemination role of VCD, particularly as DDR plan develops. 	 PRIORITY PILLAR 3 County Durham offers extended season products and experiences for our visitors. 	County Durham by	 made County Durham compelling visitor destination. KPIs By 2030, we aim to b
DIRECT FUNDING MATCH FUNDING Other resources	 Undertake an audit of existing thematic product (e.g. health and wellbeing, outdoor leisure) to support theme development as a nationally-distinctive walking destination. Define which key trends to build on (e.g. health) and animate rural marketing. Attract new family product for Durham City. 	PRIORITY PILLAR 4 County Durham offers eye-catching, authentic product meeting consumer needs	storytelling. VISITOR DWELL TIME / SPEND The number and proportion of	achieving at least th following each year 30m UK day visits 3m UK overnight visi £1,744m UK spend
DIRECT FUNDING	 Continue to lobby for high-speed broadband and connectivity in rural areas. Support businesses to develop digital presence, joint ticketing / promotions and sharing good practice. Undertake an Annual business survey feeding into NE LEP, LA data and UK Government. 	PRIORITY PILLAR 5 County Durham's businesses are supported to develop performance, resilience & profit.	 overnight stays in County Durham, the length of those breaks and value of visitor spend are increased. 	1m non-UK visits £52m non-UK spend 17,120 direct FTE jol 4,120 indirect FTE jol
Unique history and he	ritage. Outstanding cultural/natural assets. Strong/ex	perienced partnerships.	Supporting infrastructure.	







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

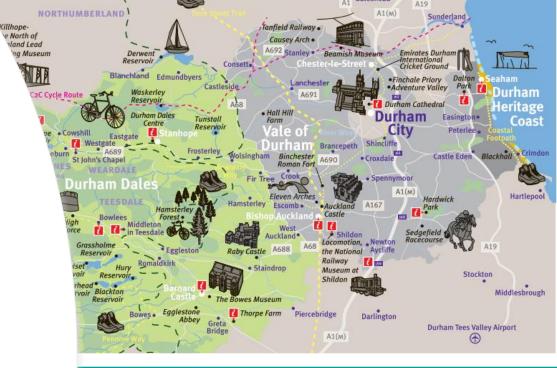


Supported by



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;

- 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





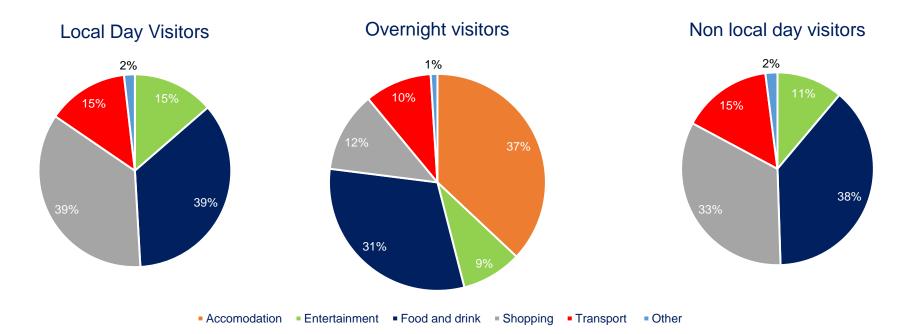


Overnight visitors

- Over a quarter (27%) had planned/were staying in self-catering accommodation
- One fifth (20%) were staying with friends or relatives
- 18% were saying 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



Average spend for day and overnight visitors

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





- 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?