

## Appendix 2

*Draft – text only version*

# County Durham Destination Management Plan 2023 to 2030

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Introduction

Update Contents when consultation finished.

**FOREWORD FROM VISIT COUNTY DURHAM CHAIR & DURHAM COUNTY COUNCIL LEADER (MG UPDATE ONCE APPROVED)**

*More than £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.*

*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.*

## INTRODUCTION

The visitor economy is a key component of County Durham's economy as demonstrated in its status as one of the county's growth sectors. The sector is a major economic enabler contributing to the business base and employment levels, providing jobs and opportunities for the county's residents.

This Destination Management Plan (DMP) is the strategy and action plan to support the sustainable development of the visitor economy in County Durham. It is a shared statement of intent from Visit County Durham and 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 underpinned by a regenerative approach to destination growth and development, offering opportunities for the region and greater wellbeing for people and the planet as regenerative tourism benefits communities, the environment, and the economy.

Collaboration, consultation and partnership between residents, communities, organisations, and businesses on the plan's strategic aims and projects is crucial for progress towards achieving the full potential of the visitor economy and ensuring the preservation of our culture, heritage and landscapes for future generations to enjoy.

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.

A co-ordinated and concerted focus on investing in the areas of greatest opportunity will continue to help drive growth to 2030.

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 a poorly managed visitor economy 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.

## 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.

### 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 Local Visitor Economy Partnerships:

- 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.

### **North East England: Visitor Economy Strategies**

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 visitor economy bodies nationally recognised status as a pilot Destination Development Partnership (DDP) with a stronger strategic relationship with VisitEngland and budget of £2.25 million from national government covering a period to March 2025. The DDP will be critical partners in place-shaping, providing effective leadership and management for the region and ensuring it is inclusive, accessible and sustainable for visitors nationally and internationally. This pilot is an outcome of the UK Government's response to the independent review of Destination Management Organisations by Nick de Bois.

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 will help shape the future landscape of destination management organisations, delivering local economic growth through the visitor economy across all seven local authorities.

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.

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.

### **Local Priorities: Council Plan and Inclusive Growth Plan**

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.

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.

### **PRINCIPLES FOR VISITOR ECONOMY GROWTH**

A set of principles underpin the way that Durham seeks to grow the volume and value of its visitor economy:-

**Working in partnership:** a visitor economy can only be successful if the community, and the public and private sectors work together. This is because the services and facilities that visitors use during a visit are provided by a very wide range of businesses, organisations and service providers and used by our resident population. None can create a good visitor experience on their own. If they don't work together to get the visitor experience right, the result is likely to be a fragmented, inconsistent and ultimately an unsatisfactory visit. Limited resources at the destination level make partnerships at the regional and national level increasingly important and in the future accessing government funds.

**Basing decisions on evidence:** County Durham ensures that it has robust and relevant market intelligence based on good quality and timely research so that decisions by all stakeholders in the county's visitor economy are based on evidence. The evidence base

comprises: an annual appraisal of the economic value and volume of visitors; trends in business performance particularly occupancy and footfall; profiles of visitors and non-visitors and information about their perception of the county and their experience of visiting it; benchmarking data for similar destinations in England; the comparative performance of the county nationally; and studies into particular aspects of supply and demand, for example accommodation.

**Adopting a regenerative approach, ensuring growth is sustainable:** regenerative tourism is an approach that focuses on restoring, renewing, and revitalizing the natural and cultural resources of a destination through sustainable practices. It aims to create positive impacts on the environment, local communities, and economies while providing authentic and meaningful experiences for travellers. This approach goes beyond sustainability by actively contributing to the regeneration and improvement of the places visited. The principles of sustainable development are important to all places that aspire to attract and welcome visitors, but they are particularly relevant in a county where the natural landscapes and built heritage are central to the visitor offer. Growth which damages the core product will eventually undermine growth and have a negative impact on the people who live and work in the county. Sustainable tourism, or 'wise growth' as it is sometimes known, uses a framework known as VERB, which ensures that development is balanced between the needs of the Visitor, the Environment, Residents and Businesses.

## **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 approach 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.



## WHERE WE ARE NOW

### Visitor Economy: A Driver for the North East

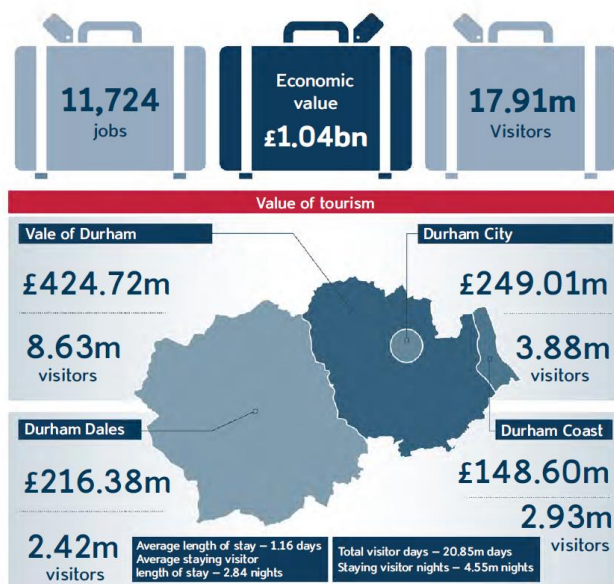
The full potential of the visitor economy in the North-East is being realised by the investment, collaboration and strategic focus of the North East DDP. Headline objectives for the pilot DDP for the three-year period 2022-25 concern growth, best practice and data, whilst stretch targets include driving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

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.

### County Durham: The Current Value of the Visitor Economy

In 2022 the visitor economy contributed £1.04 billion to the county's economy, supported 11,724 jobs and attracted 17.91 million visitors.

(At design stage insert original info graphic file here)



### Visitor Satisfaction

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.

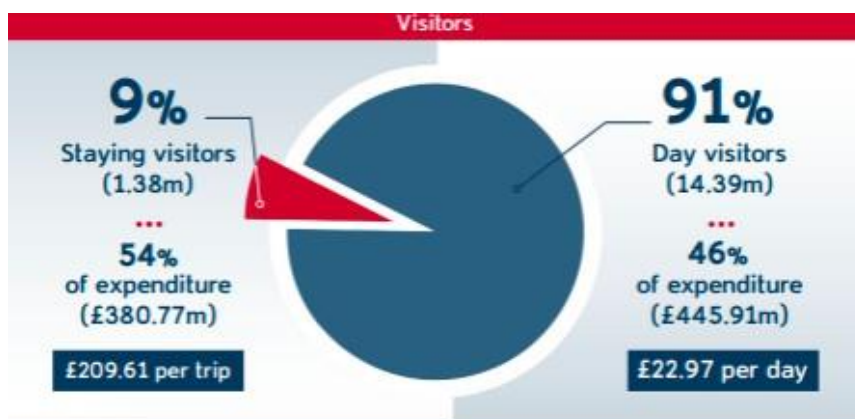
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As well as consistent improvement of current satisfaction levels, another area of the visitor economy that needs ongoing focus is the ratio of day visitors to overnight stays.

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)*



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.

## WHERE WE WANT TO BE

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

There is an opportunity now to make a step change for the visitor economy in County Durham, both through the range of new and enhanced activity and attractions coming onstream, 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 our traditional core offer and fully promote our experiences, 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, attractions and hospitality 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.

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 new national and international audiences wishing to explore the North East.

## **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.*

*Our vision for sustainable tourism in County Durham over the next 10 years is to create a destination that harmoniously balances the needs of visitors, businesses, communities, and the environment. We envision a thriving industry that enhances the visitor experience, supports local businesses, empowers communities, and preserves the natural and cultural heritage of the region.*

*County Durham will encourage a regenerative approach to visitor economy development that focuses on restoring, renewing, and revitalising the natural and cultural resources of County Durham through sustainable practices. We will create positive impacts on the environment, local communities, and economies while providing authentic and meaningful experiences for visitors.*

### **Which vision or a combination**

*By 2030, we aim to be achieving at least the following each year:*

- *30m UK day visits*
- *3m UK overnight visits*
- *£1,744m UK spend*
- *1m non-UK visits*
- *£52m non-UK spend*
- *17,120 direct FTE jobs*
- *4,120 indirect FTE jobs*

### **Develop social and environmental targets aligned**

## HOW WE'LL GET THERE - 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.

Five key objectives will help us achieve our vision.

We have used extensive research, consultation and market insight, together with our economic Theory of Change (see Appendix X), to develop five priority pillars. These are linked to clear actions and evaluation and will enable us to support the delivery of our three core outcomes. Through our work with the regional pilot Destination Development Partnership we will develop social and environmental Theory of Change models, these three models will form the heart of our plan to 2030

These actions have been developed to be specific, measurable and achievable with realistic timelines. The suggested timescales we have used are:

- Short term – up to 1 year
- Medium term – 2-3 year
- Long term – up 5 years

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

**OBJECTIVE:** County Durham will experience a significant increase in the perception of quality of the County Durham visitor offer by existing and new visitors alike.

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 in class.

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.

<b>Activity</b>	<b>Delivery Lead / Support</b>	<b>Delivery Timescale</b>	<b>Evaluation Measure</b>
Develop and communicate the business case for continuous quality development and investment by businesses.	VCD	Short term	Business case developed and used by businesses
Develop an industry training action plan focused on inclusive welcome, including international.	VCD LVEPs VisitEngland/VisitBritain	Short term	No. of staff attending training
Deliver the Welcome to Durham training programme to encourage and develop front-line staff and County Durham residents into 'ambassadors' and develop more pride in the place that they live and work	VCD	Ongoing	No. of staff attending training No. of Welcome to Durham ambassadors
Durham County Council Tourism Internal Working Group to support inclusivity improvements and develop County lead role for tourism & culture in the devolution plan.	VCD DCC	Short to medium term	No. of improvements made
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.	VCD	Long term	No. of investment enquiries supported No. of new products
Use industry award schemes as a catalyst for quality improvement and promote and utilise winners as champions for quality.	VCD Industry partners	Short term	PR Value Website stats
Provide an online and signpost to business development tools and resources and promote to all tourism businesses.	VCD Industry partners	Short to medium term	No. of businesses accessing resource (website stats)
Ensure equality, accessibility and disability awareness is embedded within general customer service training programmes.	VCD	Ongoing	No. of staff attending training

**PRIORITY 2: Promote County Durham with a compelling narrative to attract external audiences**

**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.

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.

Activity	Delivery Lead / Support	Delivery Timescale	Evaluation Measure
Commission perceptions research using the 2016 research as a baseline. Disseminate research results to key stakeholders.	DCC - VCD and BD Industry partners	Short term	No. of stakeholders engaged
Using the perceptions findings and recommendations develop a clear place narrative and standout proposition which will be used by key stakeholders and partners in their activity and to advocate to key selected audiences via agreed channels.	DCC - VCD and BD Industry partners	Short term	No. of businesses adopting the brand No. of brand ambassadors
Refresh the destination brand and destination stories based on new visitor trends and insights.	VCD	Short term	Consumer feedback on new approach (survey)
Develop and deliver a strategic marcomms plan to increase the promotion of County Durham's authentic and unique products and experiences to attract regional, national and international visitors, using new media and viral marketing techniques to engage younger audiences.	VCD Industry partners	Short to medium term	Volume and value increase Increase in international and younger audiences
Develop messages (through market research) that reflect the distinctive nature of County Durham products and experiences throughout the year.	VCD Industry partners	Short term	PR Value Website stats
Work with wider broadcast and media partners and large events to increase County Durham's exposure of visitor economy assets and capture more visits.	VCD Industry partners	Short to medium term	PR Value Website stats
Develop campaigns to encourage short stay ‘event’ visitors & their families to stay longer or return	VCD Industry partners	Short term	Event evaluation Increase in overnight and longer stays
Promote and build on the success of films and TV shows that showcase the county with examples including Harry Potter, Vera, Robson Green’s Weekend Escapes and Matt Baker’s, Travels with Mum and Dad to encourage screen tourism	VCD Industry partners	Medium term	Increased film and TV production in the region Website stats

**PRIORITY 3: Develop season extender sustainable, engaging and authentic year-round products and experiences to attract new and existing longer staying visitors that benefit locals as well as attracting national and international visitors**

**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 March to October period.

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.

<b>Activity</b>	<b>Delivery Lead / Support</b>	<b>Delivery Timescale</b>	<b>Evaluation Measure</b>
Focus working groups on creating thematic strands for the shoulder months including wellbeing, edutainment, workcation and festivals and events	VCD DCC Industry partners	Long term	Increase in visitor numbers and occupancy levels in shoulder months
Develop existing and new visitor activities and experiences that are less weather dependent, appeal to visitors throughout the year and reflect and support the local area.	VCD Industry partners	Short term	No of new experience and products Increase in visitor numbers in the shoulder months
Increase occupancy in the shoulder seasons, encourage off-peak short breaks and promote non-seasonal events, attractions and entertainment. Pricing, special deals and promotions should all encourage the use of facilities in the time between high and low season.	VCD Industry partners	Long term	Increase in visitor numbers and occupancy levels in shoulder months
Use 'attract and disperse' marketing to encourage urban and rural connectivity to help raise awareness of the destination offer to deliver growth and spread the benefits of growth throughout the year.	VCD LVEPs VisitEngland/VisitBritain	Short term	Evidence of attract and disperse activities and impacts.
Develop monthly digital thematic consumer marketing campaigns to encourage visits at all times of year	VCD	Ongoing	Open and click through rates Website stats
Work with industry partners to develop initiatives for product and marketing campaigns for corporate activities, weddings, family celebrations and other niche activities.	VCD Industry partners	Medium term	New product Campaign engagement
Work with existing attraction, activity providers, retail and hospitality businesses to extend winter opening.	VCD Industry partners	Medium term	No of businesses extending hours

**PRIORITY 4: Develop eye-catching, authentic and suitable product meeting consumer needs,**

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

Over the past three years, the sector has learnt that being agile and responding to new trends, data, and insight is critical for business sustainability and 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.

<b>Activity</b>	<b>Delivery Lead / Support</b>	<b>Delivery Timescale</b>	<b>Evaluation Measure</b>
Working with stakeholders attract inward investment through targeted activity to increase accommodation provision encouraging a broad range of high-quality and sustainable accommodation types.	VCD DCC, Business Durham and Industry Partners	Long term	Increase in bedstock Increase in staying visitors
Work with existing accommodation providers to continually improve quality, diversify and expand.	VCD DCC, Business Durham	Long term	Increase in bedstock Increase in staying visitors
In partnership with businesses and organisations develop authentic and new low impact and low carbon products and experiences that are informed by consumer trends and behaviours (e.g. walking, cycling, Glamping, outdoor concerts, museums and parks at night) and suited to local environments and communities.	VCD Industry partners	Medium term	No of new experience and products Increase in longer staying visitor numbers
Develop a critical mass of things to see and do in the county's main towns and visitor hubs, ensuring development is sustainable and appropriate.	VCD DCC Industry partners	Long term	Increase in visitor numbers in shoulder months
Commission a transport connective feasibility study to review current provision and make recommendations for creative solutions in resolving connectivity challenges	VCD DCC Transport providers	Long term	Evidence of improved public and private transport provision
Showcase local food, drink and produce through encouraging hospitality businesses to create local produce menus, developing more food and drink experiences and packing existing product for itineraries and food trails. Create a food narrative and story for	VCD Industry partners	Medium term	Open and click through rates Website stats
Develop walking and cycling offer. Create new and promote existing routes and trails linking with destination products to attract and disperse visitors, encouraging longer and overnight stays.	VCD DCC Industry partners	Medium term	New product created and promoted
Develop ground handler and baggage transfer connections	VCD	Long term	No of new businesses
Work with businesses to adapt their offer for the walking and cycling market.	VCD	Short term	No of businesses



**PRIORITY 5: Support businesses to develop performance, resilience and profit**

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

In a sector with a high proportion of micro and small businesses core business support is critical to future success.

The extensive research work carried out in recent years showed the vital importance of building a successful business base with skilled staff in improving prospects for the County and region.

<b>Activity</b>	<b>Delivery Lead / Support</b>	<b>Delivery Timescale</b>	<b>Evaluation Measure</b>
Support businesses to develop their digital presence, joint ticketing, and digital promotion	VCD	Medium term	Increase in County Durham online presence and profile
Undertake regular business surveys to identify emerging issues and challenges, tailoring support provision accordingly	VCD	Short term	No of survey respondents Dissemination of results
Develop an annual business and skills training programme tailored to business requirements	VCD Industry partners	Short terms	No. of staff attending training
Provide routes to market and access to promotional opportunities encouraging use of place, destination and campaign toolkits to ensure coherent and consistent County Durham messaging	VCD	Short term	Businesses engaged
Provide quality improvement and business development advice to support the industry to improve quality and grow their business.	VCD	Ongoing	No. of businesses supported
Create opportunities for peer-to-peer networking and support	VCD	Short term	Attendance at events
Ensure businesses have timely and relevant information e.g. available investment funding, new trends, consumer insights, business support services and access to advice	VCD	Ongoing	Open rate B2B e-newsletter B2B website stats
Increase cross-sector collaboration by building relationships with local producers and create and maintain an online local supplier list for businesses.	VCD Industry partners	Ongoing	No of supplier businesses B2B website stats
Encourage cross promotion of product between businesses e.g. accommodation providers to list nearby attractions on their websites.	VCD Industry partners	Ongoing	No. of businesses promoted
Work with retail and market traders to engage with events, incorporate more local products and experiences	VCD	Short term	No. of businesses using local produce
Increase regional collaboration to join up product and experience developing regional and thematic itineraries with partners targeted to the travel trade and international audiences	VCD LVEPs	Medium term	No. itineraries produced Increased international and group visits

## 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.

## 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 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.

## 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.

### 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)..

#### **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

## SWOT ANALYSIS

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

### Partners and consultees involved in the development of the 2023-2030 County Durham Destination Management Plan **UPDATE**

Private sector tourism businesses (consultation event xxxxxx)	East Durham College
	Eleven Arches
Auckland Project	
	Forestry Commission/Hamsterley Forest
Auckland Castle Trust	Headlam Hall Hotel
Beamish Museum	Historic England
Bishop Auckland Town Team	Killhope
Business Durham	Lambton Estates
	Land of Oak and Iron

	Locomotion
	Lumley Castle
	Natural England
Cultural Partnership	North East Chamber of Commerce
Dalton Park	North Pennine Dales LEADER
Destination Seaham	North Pennines AONB Partnership
Discover Durham	North Pennines AONB Tourism Working Group
Durham BID	Northumbrian Water
Durham Cathedral	Radisson Blu
Durham City Coaches	Rockliffe Hall Hotel
Durham County Council - Environment and Sustainable Communities Overview and Scrutiny Committee, and Economy and Enterprise Overview and Scrutiny Committee	Rose & Crown Hotel
Durham County Council - Tourism Internal Working Group	Seaham Hall Hotel
Durham County Council Regeneration Economy & Growth MT	Stanhope Parish Council
Durham County Council Strategic Planning Board	The Bowes Museum
Durham County Council Sport and Culture	The Gates Development
Durham County Cricket Club	
Durham Employment & Skills	
Durham Events Forum	
Durham Heritage Coast Partnership	VCD Board
Durham Indoor Market	Visitor Information Network
Durham Railway Station	Weardale Visitor Network
Durham University, Culture Division	WHS Coordinating Committee
Durham Wildlife Trust	

### Summary of Durham's offer/gap analysis

Durham is essentially a heritage and countryside destination and is particularly associated with heritage by visitors to the county. New product in recent years has built on its heritage assets and major events have highlighted them at a national level. Heritage is set to be at the forefront of development over the coming years with the plans to develop a 1950s and 1980s offer at Beamish Museum, the emergence of Auckland Castle as a major visitor destination, including developments at Eleven Arches and the Cathedral's Open Treasure project enhancing the city's World Heritage Site.

## 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.

Gap in offer	Impact
<b>Accommodation</b> - lack of variety in accommodation type, quality and range.	Less competitive accommodation is a contributing factor to the static o/n stay figures
<b>City Centre visitor attractions</b> - other comparable cities have a cluster of more high profile attractions than Durham City	Effects the city centre brand and attractiveness to key markets
<b>Family friendly attractions</b> – 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
<b>Conference venues</b> - 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
<b>Retail offer</b> – 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
<b>F&amp;B offer</b> – A F&B strategy has been developed, with strategies to strengthen key areas, such as the local produce messaging. But CD is still lacking the choice/range/quality (especially at high end) that is needed in order to cater for the range of markets it is targeting	Reduces opportunity for o/n stays, spend and brand development
<b>Evening economy</b> – 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
<b>Gardens, parks and properties</b> – 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
<b>Events and sport</b> – 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
<b>Transport</b> - 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
<b>Visitor service / public realm</b> - With growing emphasis on end-to end visitor experiences, accessibility, international visitors and sustainability,	Inability to respond



CD has some gaps in its ability deliver excellent customer service and a forward-thinking plan for the public realm

directly to the needs of every visitor

#### 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.

Graphic to be inserted

This section provides more detail on Durham's offer in 2023.

**Accommodation:** There are over xxxxx bed spaces\* (this includes seasonal university accommodation). Update numbers

Accommodation type	Inspected	Non-inspected
B&B/Guest		
Hotel	24	25
Self-catering	112	135
Caravan & Camping	8	31
Campus	1	
Hostel	6	5
<b>Total</b>		

**Activity providers:** There are currently 83 activity providers across the county who provide tours, outdoor activities and a range of visitor services. The most current list includes:

**Attractions:** There are more than 70 visitor attractions in the county. The most visited paid attractions in 2023 (for which there is data) with footfall of more than 50,000 were:

The most visited free attractions in 2023 with footfall of more than 50,000 were:

\*includes visitors and worshippers, ^includes a high percentage of resident dog walkers

**Churches with visitor appeal:** Adding to Durham's heritage product are a number of historically significant churches including the oldest complete Saxon church in the UK at

Escomb, the Saxon St Mary the Virgin at Seaham, High House Chapel in Ireshopeburn, Ankers House St Mary & St Cuthbert in Chester-le-Street and Newbiggin Methodist Chapel.

**Conference and meetings facilities:** The county's meeting facilities are mainly located in larger hotels. Durham University provides a range of venues taking meetings of between 15 and 400. In addition the Emirates Riverside International Cricket Ground, Gala Theatre, the Durham Centre and NetPark all have varying sizes of meetings facilities without attached accommodation.

**Events and festivals:** The county has a growing programme of annual events that have regional pull, complemented with a developing programme of signature events which now command national reputations. The annual programme comprises: Brass – Durham International Festival, Durham Regatta, the Durham Book Festival, the Durham City Christmas Festival and the Bishop Auckland Food Festival. The county's signature event is Lumiere Durham, now recognised as the biggest and best UK light festival.

**Food and beverage:** There are several hundred visitor-facing food and drink businesses in the county. The offer is wide and varied in terms of scale, type and quality. The County has a range of award winning farm shops that specialise in quality local produce and local dishes. The rise of micro-breweries in the county is significant with companies such as Sonnet43 leading the way. Locally named products, such as Durham Gin, are contributing to the distinctiveness of Durham.

**Natural assets:** The **North Pennines Area of Outstanding Natural Beauty** name change, UNESCO Global Geopark, the Durham Heritage Coast and a range of estates, parts of which are open to visitors, are important rural assets. Durham also has a considerable Forestry Commission property in Hamsterley Forest and a number of reservoirs with considerable visitor potential, including Derwent, Tunstall and Balderhead. Durham has several species of flora and fauna that are specific to the county and are a point of differentiation including: Black Grouse, blue gentian, bats, rare butterflies, hay meadows and pastures, wooded tributary valleys (denes) and heather moorlands.

**Retail:** Primary tourism retail centres are Durham City and Barnard Castle. Durham City currently offers a range of national brands while Barnard Castle has a good proportion of independent stores and antique shops. Dalton Park, in East Durham is a substantial and expanding out-of-town discount retail outlet.

**Sports:** Durham is home to Durham County Cricket Club which operates out of the Emirates Riverside Cricket Ground and hosts international test cricket, county cricket, and international and one-day events. Sedgfield Racecourse operates around 22 days a year. The county also offers around nine golf courses with mixed levels of access for visitors. Durham Regatta is one of the largest and oldest rowing events in the UK.

**Walking and cycling routes:** There are a minimum of 120 designated and branded walking and cycling trails in the county, including the Northern Saints Trails, Heritage 100, W2W through the Durham Dales, the award-winning Coast to Coast and the North Sea Cycle Route as well as, an impressive network of railway paths and a number of routes across the North Pennines Area of Outstanding Natural Beauty. The Pennine Way, the Durham Heritage Coast Footpath as well as a relatively recent new Wainwright walk are high profile routes for the county and there are a wide range of walks for all abilities and tastes north, south, east and west.

Durham is a relatively new destination for visitors compared with English honeypot destinations such as Cornwall, the Lake District, Yorkshire and Kent. It is developing rapidly but still lacks product that would be found in more mature visitor destinations. The county is not setting out to fill all these gaps. It is clear where to focus in the next four years: enhancing its heritage assets, animating its countryside and growing its arts and culture product. However, for completeness, this section lists product that Durham lacks or has relatively little of and which if developed would provide breadth and depth to the offer.

**Accommodation:** the Accommodation Study for the county highlighted accommodation that the county lacks for which there is potential visitor demand. This includes: boutique hotels - particularly in Durham City, quality bed and breakfast accommodation, inns with rooms, good quality 3 star properties, glamping sites, good quality camping and caravanning and lodge accommodation. The number of visitors staying overnight in the county remains static; a lack of new accommodation options may be part of the reason for this.

**Art galleries:** despite considerable assets in terms of fine art and sculpture, art galleries are few in the county and much of the county's collections remain in storage. A heritage city such as Durham City is expected by visitors to have a gallery of some sort but it lacks a regionally or nationally significant art space. The Bowes Museum is the only gallery in the county with nationally designated collections. The gallery in Bishop Auckland devoted to Spanish art is a welcome addition to the county's cultural offer.

**A cluster of visitor attractions in Durham City:** premier historic cities such as York, Bath, Oxford and Chester have more than one nationally recognised attraction, while York has three very high profile attractions and fourteen within walking distance of the city centre. Durham lacks this critical mass and, as a result, struggles to keep people in the city for longer than half a day.

**Conference venues:** Durham currently lacks a dedicated conference facility. Conferencing takes place across a range of the county's larger hotels and it is mainly corporate in nature. Demand for facilities has been demonstrated through research and an enhanced conference offer could help address the county's seasonality challenges. However, the cost of creating a facility is currently prohibitive. Plans to develop a hotel at the Emirates Riverside Cricket Ground and the prospect of development at the Milburngate site in Durham City may change the county's conference offer.

**Countryside events:** Durham has a range of county, (mainly agricultural) shows, but none that rival the scale and profile of the Great Yorkshire Show or the South of England Show. Great Yorkshire Show is an example of how rural county shows can command a place on the national visitor calendar.

**Country sports:** despite a good quality product for country sports, including angling, riding and shooting (the River Wear is rated the best sea trout and second best salmon river in England), the county has little that is accessible for the general visitor. Development of riding, fishing and shooting experiences and holidays could go a long way to draw more visitors to the county's rural areas.

**Distinctive retail offer:** visitors to the county do not associate it with a distinctive retail offer unlike some of its national comparators such as Chester, York, Bath or Oxford. Durham City has more of a "clone high street" than a cluster of independent and local outlets while Barnard Castle is the only market town in the county with a relatively distinctive retail offer.

**Evening economy and entertainment:** in comparison with other heritage cities (Bath, York and Chester) and rural destinations (Yorkshire, Cumbria, Cheshire and Lincolnshire)

Durham's evening offer is limited. A low key evening economy impacts on the ability of the county to attract staying visitors and the ability of Durham City to compete as a short break destination.

**Family attractions:** Durham is gradually building its portfolio of family attractions. Aside from its highest performing attraction, Beamish Museum, which has intergenerational appeal, its portfolio of family attractions include: Hall Hill Farm, Killhope Museum, Adventure Valley, Beamish Wild, Locomotion and Diggerland. However, the county is not perceived by visitors as family-focused and Durham is not currently viewed as a leading family destination.

**Gardens, parks and public spaces:** gardens are one of the mainstays of rural tourism product. The county has one RHS accredited garden and several gardens with a growing profile and reputation such as Crook Hall and Gardens. However, none of Durham's gardens have a national reputation on the scale of Harlow Carr or Alnwick and gardens that do exist are mainly attached to stately homes that are open intermittently and seasonally. There has been some progress for example developments at Wharton Park and Durham is gradually developing a distinctive small garden offer. The proposed walled garden at Auckland Castle will be another welcome addition but more is needed.

**English Heritage properties:** proportionate to the size of the county, Durham has few properties managed by English Heritage and what they do have are ruins. They are Barnard Castle, Egglestone Abbey and Finchale Priory.

**National Trust properties:** the county has just one National Trust property, Crook Hall and Gardens and a stretch of land along the coast. Durham is therefore almost absent from the national marketing activity undertaken by the trust and is not a draw for National Trust members.

**Quality restaurants:** Durham needs to increase the number of restaurants participating in quality schemes, particularly the Taste Durham quality scheme. This will ensure that the bar is raised on quality, service and local sourcing. **The county has several quality establishments such as the Raby Hunt (Michelin starred). Closed? check**

**Transport:** connectivity continues to be a challenge. Durham City is fragmented and confusing for visitors with many attractions situated on its periphery with no clear way for the visitor to get to them including the Oriental Museum and the Botanic Gardens. The city is generally poorly connected to other parts of the county except by car. The rural areas face a particular challenge with connectivity. The Hadrian's Wall bus is often held up as an example of good practice in facilitating visits to remote attractions.

**Visitor welcome, customer service and professionalism:** Visitor expectations and competition are increasing all the time. Durham and the North East are known for friendliness and openness. However, visitors expect more and visitor management, like any other consumer service or product, is a skill. Visitor economy skills and training opportunities should be pursued to ensure Durham can compete with industry standards. There is a correlation between offering good service and profitability and one weak link in the chain can undermine the whole visitor experience.

## 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.

## VISIT COUNTY DURHAM

### 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.

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.

VCD's core budget supports a staff team 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.

## **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.
- 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.