

# *This is* **durham**

Durham Tourism Management Plan 2012-2016

Final Draft

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## 1. Context and background

The Durham Tourism Management Plan (DTMaP) is:

- the destination's plan which converts county, regional and national market research and strategies into a county based plan to grow the county's visitor economy.
- for all organisations and individuals in County Durham, and, where relevant, national bodies to help them understand what is being done, what needs to be done and how they can contribute to our success.
- managed by Visit County Durham, the organisation that coordinates the development of the visitor economy and manages and markets the destination.

## 2. The visitor economy vision for County Durham

'County Durham will offer a visitor experience that matches its outstanding natural landscapes and internationally famous built heritage. The visitor economy will support long term social, economic and environmental sustainability right across the county and be recognised by the county's residents as important to the quality of their lives.'

More specifically the vision for County Durham outlines that:

- by 2015 Durham will offer a visitor experience that matches or exceeds the best offered by England's premiere county destinations.
- the county will fulfil its potential as one of the North of England's lead destinations, attracting visitors to the region from across the UK and from target overseas markets.
- by 2020 the county's visitor economy will account for 17% of the county's economy.

## 3. The value of the visitor economy

### County Durham

- The visitor economy is currently worth over £659m to County Durham.
- 1.51 million overnight tourists visited County Durham in 2010, spending almost 4.2 million nights in the area.
- More than 16.1 million day visits were made in the area.
- Tourism supports 10,682\* full time equivalent (FTE) jobs in County Durham of which 8,572 are directly employed in the visitor economy.

*\*Currently under review in light of the conference and meetings study.*

### North East England

- In 2010 the North East attracted 8.6 million overnight visitors, an additional 100,000 on the previous year. Additionally 73 million day visits were made to the region.
- These visitors brought in £3.9 billion to the regional economy.
- These visitors support 63,273 FTE jobs in the region (4.5% of regional jobs) while the visitor economy contributes 5.9% to regional GVA (ONS).
- It is estimated that more than 10,000 businesses are supported by the visitor economy including over 3,000 accommodation businesses and 6,000 pubs, restaurants and cafes.
- Hotel occupancy stood at 69% in 2011 compared to 56% in 2003, while self-catering unit occupancy stood at 47% in 2011 compared to 43% (2003).

## England

- Taking the direct and indirect impact of tourism together, the tourism sector was worth £96.7bn in 2009, equivalent to around 8.2% of UK Gross Domestic Product.
- 2.2 million jobs are supported by tourism.
- In 2009, UK residents took 96.4m overnight trips spending £16.2b in the UK
- 25.5 million international visitors visited the UK in 2010, spending £14.5 billion. The top five inbound markets are USA, Germany, France, Irish Republic and Spain.
- England room occupancy rates in serviced accommodation stood at 66% in 2011. However, hotels have consistently higher occupancy rates than B&B's (69% and 49% in 2011 respectively).
- Visits to attractions increased by 3% from 2009 to 2010, with the strongest growth in visits to museums and galleries, and historic properties.

## 4. Durham's visitor economy priorities

As a destination, Durham focuses on agreed priorities and on the methods of delivery which can achieve the best results for the county. These priorities are a result of extensive visitor, market and product research and intelligence and are endorsed by:

- The Durham Tourism Management Plan (DTMaP) Committee made up of private and public sector visitor economy stakeholders from across the county.
- The Visit County Durham Board made up of private and public sector visitor economy stakeholders from across the county.
- The tourism industry conference.
- A range of visitor economy partners.

The following 8 priorities and methods of delivery have been identified and agreed as the most important areas of destination development:

- (1) Optimise the potential of Durham City** to attract visitors to the county, particularly staying visitors, by making it a viable 48 hour stay. Specifically through trying to attract and prompt investment in new and existing visitor attractions that will have national profile and recognition. The visitor offer needs more breadth and depth and improved quality in terms of both its leisure and business tourism product. The new Destination Development Plan for Durham City contains detailed actions to achieve this objective.
- (2) Increase spend by implementing a step change in the quality of the visitor experience post arrival**, so that the county attracts and satisfies the needs of higher spending visitors and that Durham competes nationally as a quality destination. Case studies show that improving quality, both physically and in terms of service, increases visitor spend and contributes to the profitability of tourism businesses. This can be achieved by aligning Durham with national policy in relation to quality of product and focusing on actions that improve customer service in visitor-facing occupations.
- (3) Develop local distinctiveness** by using the destination brand name 'Durham', its sub brands - Durham City, Vale of Durham, Durham Coast and the Durham Dales and its brand themes – history and innovation, people, location and connectivity. Visitor research shows that local distinctiveness plays a role in differentiating a

destination from its competitors and makes a significant contribution to a positive visitor experience.

- (4) **Tackle seasonality by focusing on two areas of development: events and business tourism.** Specifically to invest in events that have potential for regional or national significance and which can be scheduled in the shoulder or off season and to invest in the conferencing and meetings sector to increase visits in the shoulder season and mid-week. Seasonality can prevent employers from investing in their staff and their products and this can impact negatively on the visitor experience.
- (5) **Grow the profile of the county regionally and nationally** by developing and marketing product with national resonance. Specifically to grow events and attractions which have national pulling power i.e. Lumiere, Durham Cathedral, Beamish Museum and Durham County Cricket Club. The lead attractors can spearhead other attractors in the roll out of the destination brand nationally to stimulate more first time staying visitors. Durham currently has a large proportion of repeat visitors from the local area.
- (6) **Extend stay by optimising the potential of market town and town centres** to draw visitors into rural areas. Visitor research shows that Durham's towns hold significant appeal for visitors and can perform the dual role of attracting people out of the urban centre and providing a service centre for people on rural and coastal holidays. This can be delivered through the implementation of destination development plans for Barnard Castle, Stanhope, Bishop Auckland, Chester-le-Street and Seaham.
- (7) **Manage and maintain the public realm** taking into account the needs of visitors as well as residents in the county. "Easy win" elements in post arrival visitor satisfaction levels include robust cleaning regimes, appropriate signage and suitable toilet provision. This will help visitors to enjoy their whole experience and prevent public realm becoming the weak link in Durham's visitor offer. Durham County Council Neighbourhood Services policies are in place on these issues, but need to be translated into specific scheduled actions and activities.
- 8) **Increase the contribution of Durham's rural areas to the overall value of the county visitor economy.** Through an audit of rural tourism assets to ascertain their scope, quality and potential economic value and projects to animate rural areas, so there is more to see and do. County Durham has the raw materials of a good rural tourism product, but it needs to be better understood by partners in the county, so it can be developed and then confidently marketed.

## 5. Areas of work which contribute to achieving our priorities

- Businesses improving their performance
- Providing visitors with information about the destination throughout the visitor journey
- Marketing the destination to existing and potential visitors
- Developing the product
- Ensuring that visitors have a good experience
- Developing the tourism and hospitality workforce

The priorities and areas of work are underpinned with:

- Partnership working wherever possible
- Research and market intelligence about the destination to help decision making
- Evaluating the performance of the visitor economy.

### Wise Growth

Underpinning all the objectives are the principles of sustainable tourism, particularly in a rural county where the natural landscapes and an historic city are central to our visitor offer. Sustainable tourism, now rechristened 'wise growth', uses a framework known as VERB, which ensures that development is balanced between the needs of the Visitor, the Environment, Residents and Businesses and delivers benefits for all.

## 6. County Durham's offer in 2012

- **Attractions:** There are approximately 70 visitor attractions in the county. The most visited are **Durham Cathedral (more than 600,000 visitors and worshippers in 2011)** and **Beamish (497,891 in 2011/12)**. Other attractions with significant visitor numbers over 20,000 in 2011 include:
  - Hardwick Park 477,000\* (\*Includes a high % of residents)
  - Locomotion 217,682
  - Hamsterley Forest 178,506
  - World Heritage Visitor Centre 169,000
  - Durham County Cricket Club 136,024
  - Adventure Valley 116,982
  - The Bowes Museum 114,891
  - High Force 50,594
  - Tweddle Farm 50,195
  - DLI 39,907
  - Raby Castle 27,120
  - Botanic Gardens 25,161
  - Barnard Castle 22,950
- **Natural assets:** County Durham has an abundance of natural assets. Key areas include the Durham Dales which incorporates part of the North Pennines (designated as an Area of Outstanding Natural Beauty), the Durham Heritage Coast and a range of estates, parts of which are open to visitors, including Raby Estates which owns and operates High Force and other assets in the west. The Church Commissioners and Durham County Council own and operate recreational areas and parkland including the Auckland Castle Deer Park and Hardwick Park. County Durham also hosts a considerable Forestry Commission property in Hamsterley Forest. County Durham's reservoirs are another hidden gem with considerable visitor potential, including Derwent, Tunstall and Balderhead reservoirs.

- **Accommodation:** There are approximately 650 accommodation businesses with over 15,000 bed spaces\* (this includes seasonal university accommodation). This currently equates to approximately the following breakdown by type:  
Inspected and graded (282 Properties) Camping & Caravan Site 11, Campus 2, Guest Accommodation 75, Hostel 8, Hotel 26, Self-Catering 160.  
Not inspected (213 properties known) Camping & Caravan Site 5, Campus 2, Guest Accommodation 75, Hostel 9, Hotel 22, Self-Catering 100.  
*\*A survey of all County Durham's accommodation stock is currently underway and should be completed in Summer 2012. The study will audit Durham's assets, quality issues, identify gaps and make recommendations on market demand.*

- **History and heritage:** As a destination, County Durham has an impressive range and depth of Christian and industrial heritage. From Saints to Prince Bishops, Romans to Monks to mining, rail and 20<sup>th</sup> century history, Durham has many historic assets and layers. Durham also has a wide variety of historically significant churches including Escomb Saxon Church, 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.

- **Activity providers:** There are currently 34 activity providers across the county who provide tours, outdoor activities and a range of visitor services. The most current list is as follows:

Real Birder Tours	Wild North Discovery
Specialist Cycles	Hamsterley Forest Cycling
Wood N Wheels Cycle Hire	Explore Britain
Hury Valley Trout Fishery	Selset Reservoir Trout Fishery
Balderhead Reservoir Trout Fishery	Derwent Reservoir Trout Fishery
Sharpley Springs Fishery	South Causey Activities
Durham Climbing Centre	Wearsdale Off Road
Beamish Wild Ropes Activity Centre	Supreme Adventure Sports
Undersiege Paintball	Skydive Academy
Top Gear Indoor Karting	Fury Sports
Weardale Outdoor Centre	Massive Attack Paintballing
North of England Trike Tours	6 Blue Badge Guides
3 Green Badge Guides	Guided Tours NE England
Chrysalis Heritage	C4 Miles Holidays

- **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. 43 food and drink businesses have 'TasteDurham' accreditation which is a national standard assessment. These establishments have achieved one of two grades: quality assured or highest quality assured with some also acknowledged for their local produce.
- **Sports:** County Durham is home to Durham County Cricket Club which operates out of the Emirates International Durham Cricket Stadium and hosts international test cricket, county cricket, international and one-day events. Sedgefield Racecourse operates around 22 days a year. National cycling events such as the Halford's Road Race, the Big Bike Ride and the etape triathlon are recent additions to the sporting calendar. The county also offers around nine golf courses with mixed levels of access for visitors. Durham Regatta is one of the largest in the UK and is now in its 178<sup>th</sup> year.

- **Events and festivals:** The county has a growing programme of annual events that have regional pull complimented with a developing programme of signature events which now command national reputations. The annual programme comprises: 'Streets of' Festivals, Durham Brass Festival, the Regatta, the Book Festival, the Christmas Fair and the Bishop Auckland Food Festival. Signature events began in 2009 with Lumiere in Durham City, which was expanded in 2011 and the Durham Mystery Plays came in 2010. The British Library loan of the Lindisfarne Gospels will be the county's signature event for 2013. Key headline events have established an economic impact track record and robust case to justify the investment they require.
- **Retail centres:** Primary tourism retail centres are Durham City and Barnard Castle with additional sizeable centres in Bishop Auckland and Chester-le-Street. Durham City currently offers a range of national brands, but lacks a critical mass of independent headline stores and distinctive independent retailers as identified by the recent retail distinctiveness study. Barnard Castle is the next largest retail centre which has a good proportion of independent stores and antique shops. The county also has Dalton Park, a substantial and expanding out-of-town designer discount retail outlet in Murton. The retail offer has also been prioritised as an element of the destination development plans for Barnard Castle, Bishop Auckland, Stanhope, Chester-le-Street, Seaham and Durham City.
- **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 International Durham Cricket Stadium, Gala Theatre, the Durham Centre and NetPark all have varying sizes of meetings facilities without attached accommodation.
- **Leisure walking and cycling:** There are a number of designated and branded walking and cycling trails, including the W2W through the Durham Dales, the award-winning Coast to Coast and the North Sea Cycle Route as well as the Durham Heritage Coast footpath, an impressive network of railway paths and a number routes across the North Pennines Area of Outstanding Natural Beauty.
- **Key themes and experiences to take to market:** Durham is a vibrant, green, historical and cultural destination. With a World Heritage Site at its core as well as its nationally and internationally recognised fine landscapes, Durham has positioned itself as a destination of 'Historic, Green and Natural', 'Peace and Tranquillity', 'Hidden Gems', and 'Outdoor and Active'.
- **Durham's image and identity:** Durham is positioned and promoted as a visitor destination using the place brand '*This is Durham*'. This clear and cohesive destination brand, allows Durham to be consistent with all visitor facing marketing. Visitors will be presented with a tone of voice, fonts and imagery which optimise and reflect the true nature of Durham.
- **Durham as a regional tourism base?** Geographically, Durham City and County is ideally placed in the south of the region for north-bound visitors to use it as their launching point to enjoy both the county and region.



## 7. Gaps and challenges in the County Durham visitor offer.

Below is a list of gaps in the County Durham product. Not all of these gaps will be development priorities, but where they relate to our priorities, they are worth considering by organisations and individuals operating in Durham:

- **A critical mass of headline nationally recognised attractions in Durham City.** Leading premier league cities such as York, Bath, Oxford and Chester have more than one nationally recognised attraction and it is the critical mass of several headline attractions which will allow the city to graduate to the elite UK city breaks league.  
Relates to priority 1
- **Gardens, parks and public spaces:** In proportion to the size of the County Durham lacks or fails to exploit its gardens, parks, riverbanks and public spaces for the visitor economy. There has already been some considerable progress in this area at Hardwick Park, Chester-le-Street Riverside and the planned developments at Wharton Park. However, there are number of gardens and parks which are not reaching their true potential as both a visitor economy and residential assets. Durham also has the potential and raw materials to succeed as a green city destinations.  
Relates to priorities 1, 6 and 7.
- **Art galleries:** Despite considerable assets, many of which are in storage, art galleries are also at a premium. Durham City centre lacks a regionally or nationally significant gallery. Galleries are a mainstay attractor of leading destinations. Recognised gallery brands such as the Tate Modern (which have developed galleries beyond the capital) and the National Portrait Gallery (who have previously expressed interest) would help to grow a critical mass of attractions to establish Durham as a leading short break destination.  
Relates to priorities 1, 3 and 7
- **Family attractions:** Durham is gradually building its portfolio of family attractions - Beamish, Hall Hill Farm, Killhope, Adventure Valley, Bowes Museum, Beamish Wild, Locomotion and Diggerland, but the majority of the county's attractions are generally not perceived as family-focused and Durham is not currently viewed as a leading family destination.  
Relates to priorities 1 and 6
- **Key market and coastal towns:** Key towns have themselves identified challenges with products and facilities as outlined within the five market town Destination Development Plans for Stanhope, Barnard Castle, Bishop Auckland, Seaham and Chester-le-Street. These are long term strategic plans which focus the towns to improving the visitor experience.  
Relates to priorities 2, 6 and 7
- **Quality 4-5 star hotels, boutiques hotels and good quality bed and breakfast provision:** Visitors require a range of accommodation and it is at this end of the accommodation scale that the greater economic impacts (stay, spend and employment) are achieved. Quality of bed and breakfast provision is sometimes patchy and the 2012 study should provide and insight into the scale and nature of this issue. High end B&Bs seem to be at a premium in the county.  
Relates to priority 1

- **A distinctive city retail offer:** A distinctive retail offer which motivates visitors to come to Durham for the same reason they choose Chester, York, Bath or Oxford. Like many cities and market towns around the country, there is a proliferation of the “clone high street” with chains and charity shops strangling the growth of independent and local outlets. Visitors are motivated by both the scale and range of the retail offer, but also by distinctive independent retailers which they can’t find at home and which they can recognise as consistent with belonging to Durham. Distinctive retail destinations can only evolve on the back of signature retail stores and it will be difficult for Durham to move forward without the arrival of a signature department store e.g. Fenwicks, John Lewis or Debenhams. A retail distinctiveness study has already been completed.  
Relates to priorities 1, 3 and 6
- **The Durham City conference and meetings market:** Durham City currently lacks a coordinated critical mass of quality conference assets and facilities in Durham City. Durham’s first detailed meetings and conference audit will be completed in Spring 2012. It will define the scope and potential of this high value, non-seasonal market.  
Relates to priorities 2, 3 and 4
- **Rural attraction products:** The county has a number of attractions which interpret and exploit the increasing demand for outdoor tourism – Weardale Outdoor Centre offers nature orientation and bush craft over 400 acres and the North Pennines coordinate a wide range of interpretive nature trails. Hamsterley Forest also offers a range of activities through the Forestry Commission. There are 25 rural tourism products and tours currently operating (see section 6). However the actual rural product is often raw, jaded or underdeveloped. The rural tourism assets are patchy and there is little understanding of the range, depth and economic value of rural tourism. There is a need for an audit of assets to ascertain scope, quality and economic potential of the county rural tourism portfolio. The county needs a better understanding of what it currently offers, what it doesn’t and what it needs to do before it can take the theme to market with confidence. If the rural offer can ‘raise its game’, market and entrepreneurial forces will pick up the baton, once they feel the basics are in place. There is an appetite for operators to expand into Durham from surrounding counties, if the county can ‘raise its game’.  
Relates to priority 8
- **Day extending:** The county often lacks products which encourage day extenders to stay longer and spend more. Product linkage and sustainable extended open times could address this. The offer can be sometimes disjointed for the visitors. Linked themed walks, joint ticketing or increasing organic business to business cross sector partnership working and signposting could help (i.e. attraction-restaurant or B&B-bar).  
Relates to priorities 2 and 6
- **Walking and cycling:** Durham County and City are blessed with a network of trails, but many of these require investment to bring them up to a standard which visitors expect i.e. Flass Vale. More could perhaps be made of Durham’s impressive former railway walks and routes.  
Relates to priorities 2 and 8

- **Evening economy and entertainment:** The county has a number of good entertainment venues. However in comparison to other heritage cities (Bath, York and Chester) and rural destinations (Yorkshire, Cumbria, Cheshire and Lincolnshire) the products are small in number. This limits both visitor day extending and evening economy potential. Durham required visitor economy products which allow the development of a tourism evening economy – events, evening guided walks/ghost walks, theatres, distinctive restaurants, early evening shopping and bars. This will translate into more overnight stays.  
*Relates to priorities 1 and 6*
- **National Trust and English Heritage properties:** Proportionate to the size of the county, Durham has only a limited number of these properties which can add again to the county's national profile. The county has three properties owned and operated by English Heritage.  
*Relates to priorities 5 and 6*
- **Quality restaurants:** Durham needs to increase the number of restaurants participating in quality schemes, particularly the Taste Durham quality restaurant scheme. This will ensure that the bar is raised on quality, service and local sourcing. Again, this should improve the day extending and staying overnight performance of the visitor economy.  
*Relates to priorities 2 and 6*
- **Nature tourism/species** – Durham has a wide range of species and nature assets. Black grouse, blue gentian, bats, rare butterflies, hay meadows and pastures, wooded tributary valleys and heather moorlands are just some of the things which are special about the county. This will also add to Durham's distinctiveness as a destination.  
*Relates to priorities 3 and 8*
- **A patchwork product** - Durham is currently a patchwork of incredible assets, neglected gems and confused ownership, responsibilities and funding arrangements. The component parts are still component parts rather than a holistic visitor and resident-facing coordinated whole. There are pockets of funded initiatives doing excellent work (North Pennines AONB, Durham Heritage Coast etc) but these are punctuated with assets requiring support and development (i.e. Wharton Park, Flass Vale, Castle Eden Dene) as well as underutilised assets (i.e. Tunstall Reservoir, Derwent Reservoir).  
*Relates to priorities 3 and 8*
- **Maximising the post arrival value of headline events** – Durham is gradually establishing itself as an event destination. Headline events can deliver business to tackle seasonality and bring new and overnight visitors with the potential to repeat and proliferate word of mouth marketing. However, major league events like Lumiere create high visitor expectations. To maximise these tactical opportunities, events need to also be optimised as an opportunity to showcase the destination as it is throughout the year. Other things to do, need to be evident or developed, if repeat staying visits are to be achieved. The destination needs to guarantee a high quality visitor experience. Retailers and restaurants need to take a proactive role in offering a rounded and welcoming visitor experience through extended openings and connectivity to the events. The public realm needs to be spotless to ensure that it isn't the weak link in the visitor experience.  
*Relates to priorities 1, 2, 3, 4, and 5*

- **Transport** – Connectivity continues to be a challenge. The Durham City offer is disparate and confusing for visitors. Existing services need to be engineered and branded to link assets and provide a welcoming visitor-facing service. Crook Hall, DLI and the Oriental Museum all suffer from locations which fall just beyond the main city honeypot. Equally, beyond the city, local services could be managed and coordinated to maximise sustainability and viability through offering routes and brands which appeal to both residents and visitors alike. The Hadrian’s Wall bus is often held up as an example of good practice in this area.  
Relates to priorities 1, 2, 6 and 8
- **Spending opportunities** – where possible new and existing developments should incorporate products which can be self-sustaining financially, be that a visitor centre, car parks or attractions. This can deliver viability in the long term, ensure responsiveness to market forces and trends and contribute to the overall economic impact of the visitor economy.  
Relates to priorities 1, 6 and 8
- **The 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 (perhaps a taxi driver having a bad day) can undermine the whole visitor experience.  
Relates to priorities 1, 2 and 8
- **Rural shows:** Durham has a range of county, (mainly agricultural) shows, mainly in the Durham Dales. Some attract sizeable audiences predominantly from within the county or within the immediate region. If their appeal could be broadened and their theme more populist and distinctive to Durham i.e. local produce, there may be some potential in this area. It may require cooperation, joint working and branding before they can realistically attract visitors from beyond the North East, but the Great Yorkshire Show is an example of how rural county shows can command a place on the national visitor calendar.  
Relates to priorities 6 and 8

## 8. Summary of key specific actions for the destination 2012-2016\*

Action	Priority	Delivery/Output	Lead/Champion	Support or stakeholders	Timeline
Implement the findings of the County Durham Accommodation survey.	1, 2, 3 & 5	Gaps and quality issues addressed and informing business support agencies, DCC planners and inward investment policies. Shaping DTMaP (IEP) as policy.	Private sector and Durham County Council (Regeneration & Development Team/Planners)	Hotels Association, B&Bs and all accommodation providers. VCD, Area Action Partnerships (AAPs), County Durham Economic Partnership Business & Enterprise Working Group.	2012-2016
Implement the findings of the Durham City Conference and Meetings Study.	1, 2, 4 & 6	Actions picked up by conference/meetings producers, business support agencies, DCC planning and inward investment policies and guiding. Embedded into DTMaP/IEP as policy.	Durham County Council. (Regeneration & Development Team/Planners). Durham University	VCD, AAPs, CDEP Business & Enterprise Group. Existing providers considering expansion. Potential investors.	2012-2016
Implement the findings of a rural tourism audit and activities appraisal as precursor to a rural tourism action plan.	8	Actions picked by rural tourism products. Key issues embedded into business support agencies, DCC planning and inward investment policies. Adopted as policy in DTMaP/IEP.	CDEP Rural Working Group and Natural Environment Strategy Group.	AAPs, VCD. Existing providers considering expansion. Potential investors.	2012-2013
Deliver and implement a visitor industry skills and training plan.	1, 2, 3 & 6	County-wide industry standards identified. Recruitment and adopted by 35% of registered visitor products by 2016.	Further Education Sector	Attractions, accommodation providers, restaurants, retailers. VCD, CDEP Business & Enterprise Working Group.	2012-2016
Participate in a Visit England pathfinder on Wise Growth implementation with 3 other destinations.	1, 2 & 6	To be agreed	Visit County Durham	CDEP Rural Working Group and Natural Environment Strategy Group.	2012-2013

Adoption of the Durham destination brand “This is Durham” by the industry and broadening the brand role out in place-marketing.	3 & 5	Increase industry use of the “This is Durham” brand identity in marketing channels from 50 partners to 150 by 2016 (tba).	Attractions, accommodation providers, retailers, restaurants and partners.	VCD.	2012-2016
Secure major National Trust Property and improve English Heritage activity.	5 & 6	Durham’s opens first National Trust property. English Heritage increases their activities.	DCC RED.		2013
Destination Development Plans phase 1 delivery and update/delivery on phase 2 as appropriate.	2 & 6	Phase 1 DDP action plans completed. Phase 2 action plans identified and delivered.	AAPs/DDP town steering groups.		2012-2016
Signature store attracted to the City.	1 & 5	Signature store (i.e. Fenwicks, Debenhams) opens by 2015.	DCC RED.		2015
Visitor economy established as a robust and valuable option on DCC property portfolio capital developments.	1, 3, 6 & 7	Visitor economy projects adopted and considered at same level as of economic potential as other sectors i.e. manufacturing, housing.	DCC RED.	DCC Durham County Council. (Regeneration & Development Team/Planners). Other key land and property owners such as Durham University, Durham Cathedral, private estates (i.e. Raby, Lambton).	2012-2013
Neighbourhood Service Plan commitment and adoption of visitor economy service levels on cleaning litter, signage & toilets.	1, 2, 5 7 & 8	A service plan which includes specific visitor economy actions, scheduling and targets for litter cleaning, signage & toilets.	DCC Neighbourhood Services.	DCC Neighbourhood Services, VCD.	2012

\*The Durham Tourism Management Plan Committee to guide on the implementation of the above.

## 9. County Durham's target visitor markets – Discoverers and Traditionals

By focusing on these groups of people who like our product and are already visiting in some numbers we are most likely to grow our visitors numbers and the value of our visitor economy. Visit County Durham uses a lifestyle visitor segmentation model used by Visit England. Wherever possible County Durham should seek to develop its product and gear marketing towards these two groups.

### Discoverers

- Independent individualists.
- Unlikely to be worried about what others might think.
- Little influenced by style/brand unless it represents their personal values.
- Value technology, new products, services and experiences.
- Function far out rates style as a purchase driver.
- High spenders on what they want, but intolerant of substitutes.
- Enjoy intellectual challenges but 'arts and culture' negatively perceived.
- Value good service – which means enabling them to do what they want.

12% of the GB population	47% between 25 and 44
26% over 55	High internet access
29% have children at home	55% married; 26% single
54% ABC1	70% took a holiday in last 3 years
85% car ownership	45% have a mortgage

### Traditionals

- Relatively self-reliant and independent.
- More likely to hold traditional values.
- Unlikely to justify spending on expensive alternatives.
- Brand is not a key purchase driver but the preferences they do have will tend to value more traditional established brands.
- Functionality is far more important than style and individuality.
- Value, and will pay for, good service, which for them means recognition and individual attention.
- Live life at a relaxed pace. Enjoy intellectual challenges, arts and culture.

10% of the GB population	Older profile; 73% over 45
53% over 55	57% with internet access
21% with children at home	51% married or living as married;
28% widowed/sep/divorced	43% C1C2; 36% DE
41% retired/31% work full time	58% overseas holiday (3 years)

Durham also attracts a very high percentage of Functionals, who need to be encouraged to stay longer and spend more. Functionals are:

- 
- Very price driven and value functionality strongly over style.
- Have very traditional values.
- Not prepared to pay for fashion, style or 'individuality'.
- Not early adopters of new ideas but are interested in new experiences, and happy to try things new to them.
- Enjoy intellectual challenges, traditional 'arts and culture'.
- Very resistant to spending.
- Expect good service rather than something they pay extra for.

9% of the GB population	63% over 45 years
50% married	27% separated or widowed
48% working full time	25% retired
Average income (£20K-£30K)	High frequency of internet usage

## 10. The DTMaP Investment Evaluation Process (IEP)

An integral part of the Durham Tourism Management Plan, the Durham Tourism Management Plan **Investment Evaluation Process** shapes and supports new and existing tourism projects, particularly capital projects. It enables proposers at a very early stage to understand how to ensure that their proposal is appropriate to the development of County Durham as a visitor destination and how they can shape and evolve their proposal to maximise support from a variety of agencies.

### How it helps shape development and activity

Using a set of criteria in two easy to navigate forms, the DTMaP process identifies issues that proposers need to think about when developing their ideas. By using the criteria, proposers are forewarned of the criteria most support agencies and funding bodies relate to and are able to focus on the key issues relating to tourism development. Visit County Durham staff will assist the proposer to access supporting evidence and materials and support proposers through a two stage process.

#### DTMaP Criteria

- |  |                              |
|--|------------------------------|
| - Strategic Fit                        | - Evidence of Need           |
| - Return on Investment/Value for Money | - Viability                  |
| - Deliverability                       | - Appropriateness of Funding |
| - Evaluation and Monitoring            | - Sustainability             |
| - Measures of Success (VICE)           | - Quality                    |
| - Contingency Plans                    |                              |

Once the project proposer completes the first two stages, Visit County Durham will suggest a positioning level for the project to the DTMaP Committee. The committee will then agree a level for the project as it is presented in its current format. These levels are graded as:

**Level 1** - Project has great potential, meets the criteria and will enhance the tourism product within the county.

**Level 2** -Project has some potential, meets some of the weighted criteria and some of the other criteria. Requires further work to become a level 1 project.

**Level 3** -Does not meet the weighted criteria and other criteria, requires further work to become a level 2 or redirection to another sector.

At this stage, depending on the level agreed, there are several potential benefits

- On completion of the DTMaP process, most proposers should be in a stronger position to progress projects which are more customer and market focused, more viable and sustainable and which fit strategically with county and regional plans.
- Essentially, the DTMaP process allows project developers to a) assess their strategic fit, b) access project development guidance, and c) benefit from informed signposting to a variety of support agencies.



## **11. Partners and consultees involved in the development of the 2012-2016 Durham Tourism Management Plan**

- Durham Tourism Management Plan Committee
- Durham Attractions
- Visit County Durham Board
- Durham Hotels Association
- Durham Natural Environment Partnership
- County Durham Economic Partnership Rural Working Group
- County Durham Economic Partnership Business and Enterprise Working Group
- North Pennines Area of Outstanding Natural Beauty
- Discover Durham Travel Trade Attractions Group
- Durham County Council Strategic Investments Team
- Durham County Council Planners
- Visit County Durham staff
- Teesdale Area Action Partnership Tourism Group
- Weardale Area Action Partnership Tourism Group
- Durham City Area Action Partnership
- Durham Heritage Coast
- Durham University

## 12. The story so far - DTMaP delivery by the destination between 2007-2011

Priorities	Progress
<p><b>ONE</b> Optimise the potential of Durham City to attract visitors to the county and the North East, particularly staying visitors, by making it a viable 48 hour stay. Specifically by investing in new visitor attractions that will have a national profile and recognition.</p>	<ul style="list-style-type: none"> <li>- Two headline attraction feasibility studies completed.</li> <li>- Retail distinctiveness study completed.</li> <li>- The Wolfson Gallery.</li> <li>- Heart of the City developments i.e. Market Square.</li> <li>- Opening of the World Heritage Site Visitor Centre.</li> <li>- New Destination Development Plan for Durham City</li> <li>- The opening of the Radisson Blu. Interest from other groups.</li> <li>- Review of Millennium Place.</li> <li>- Durham Cathedral development plans.</li> <li>- The emergence of Crook Hall.</li> <li>- In 2010, the readers of Condé Nast's Traveller magazine voted Durham City the 'Best city in the UK'.</li> </ul>
<p><b>TWO</b> Increase spend by implementing a step change in the quality of the visitor experience post arrival so that the county attracts and satisfies the needs of higher spending visitors and that Durham competes nationally as a quality destination. Specifically by aligning Durham with national policy in relation to quality and focusing on actions that improve customer service in visitor-facing occupations.</p>	<ul style="list-style-type: none"> <li>- Increase accommodation providers in national quality scheme.</li> <li>- Increase in the number of attractions in national scheme.</li> <li>- Taste Durham quality restaurant scheme launched in 2008 now has 60 participants.</li> <li>- Know Your Durham Coast Scheme –81 Workshop participants total, 38 Ambassadors, Bronze Certificate awards 68 including Ambassador's, Silver 8 and Gold 2.</li> <li>- Know Your North Pennines Scheme – 59 individuals and 41 businesses benefited from a total of 196 training days.</li> </ul>
<p><b>THREE</b> Develop local distinctiveness in line with the image and identity of the county utilising the destination name 'Durham' and its brand themes – history and innovation, people and location, and connectivity.</p>	<ul style="list-style-type: none"> <li>- Launch and roll out of Durham's first destination brand,</li> <li>- Four distinctive Durham areas consistent with the new brand are now promoted to visitors; these are Durham Dales, Vale of Durham, Durham City and Durham Coast.</li> <li>- Five market towns now have a Destination Development Plan process which outlines their unique selling points.</li> </ul>

<p><b>FOUR</b> Tackle seasonality by focusing on two areas of development: events and business tourism. Specifically to invest in events that have potential for regional or national significance and can be sited in the shoulder or off season and invest in conferencing facilities to increase visits in the shoulder season/mid-week.</p>	<ul style="list-style-type: none"> <li>- Signature Events: Lumiere 2009 and 2011, Mystery Plays. Lindisfarne Gospels 2013, The Ashes 2013.</li> <li>- International Cricket at Chester-le-St.</li> <li>- Annual programme of events developed.</li> <li>- City feasibility for conference and meetings market underway.</li> </ul>
<p><b>FIVE</b> Grow the profile of the county regionally and nationally by developing products with national resonance. Specifically to grow events which have national pulling power.</p>	<ul style="list-style-type: none"> <li>- Lumiere 2009 &amp; 2011 and the Lindisfarne Gospels 2013.</li> <li>- Two feasibility studies on headline attractions delivered.</li> <li>- The North Pennines AONB, became the first area in Britain to be awarded the status of European Geopark. European and Global Geoparks are supported by UNESCO.</li> <li>- Auckland Castle has been recognised as an attraction of potential national significance and talks are currently being held with the National Trust, the Church Commissioners and other parties.</li> <li>- Durham Heritage Coast - UK Landscape Award Winners 2010 and Special Mention by the Council of Europe for the European Landscape Awards 2011.</li> <li>- Durham Cathedral was voted "Britain's Favourite Building" in a survey of the best and worst of British architecture. It won more than 51% of votes cast by BBC Radio 4's listeners.</li> <li>- 2<sup>nd</sup> in the "Best UK City" Guardian 2011 Travel Awards.</li> </ul>
<p><b>SIX</b> <i>Extend stay by optimising the potential of town centres</i> to draw visitors into rural areas and provide service centres to visitors staying in rural locations. Specifically develop destination development plans and ensure their implementation for Barnard Castle, Bishop Auckland, Chester-le-Street, Durham City, Seaham and Stanhope.</p>	<ul style="list-style-type: none"> <li>- Destination Development Plans delivered for Barnard Castle, Bishop Auckland, Stanhope, Seaham and Chester-le-Street</li> </ul>
<p><b>SEVEN</b> Manage and maintain the public realm taking into account the needs of visitors and county residents.</p>	<ul style="list-style-type: none"> <li>- Working with local Area Action Partnership, Destination Development Plan towns &amp; LEADER partners across Durham.</li> <li>- Regeneration Statement/County Durham Plan.</li> </ul>

**Notes**