

# Durham Tourism Management Plan 2016-2020





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# Introduction

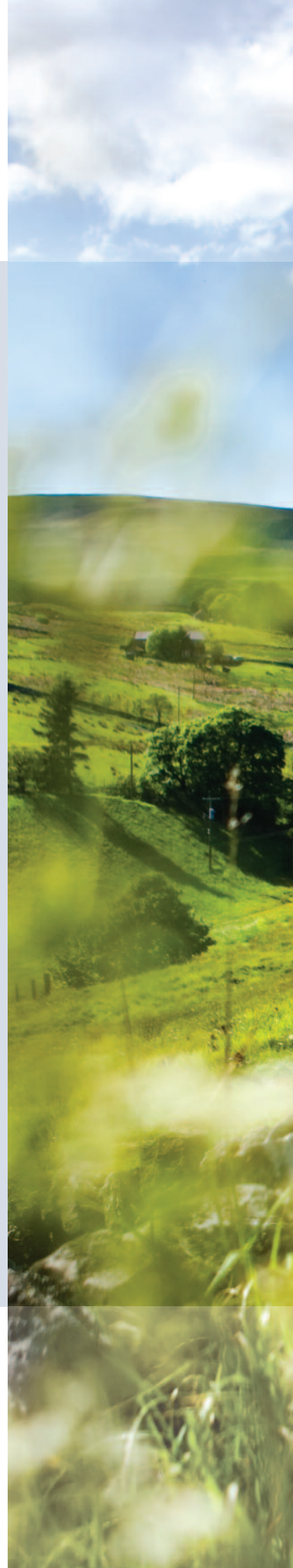
**The Durham Tourism Management Plan (DTMaP) is the blueprint for how Durham intends to grow the volume and value of its visitor economy between 2016 and 2020. Durham has had a plan in place since 2007 which has been refreshed periodically to take account of changes in the operating environment (political and financial), the needs and expectations of consumers and opportunities to develop new products and propositions. The plan last underwent a major refresh in 2012.**

The plan has been successful in informing, guiding and influencing the development of the county's visitor economy. It has provided content for local plans and regional documents such as the North East Strategic Economic Plan. It is regarded as an important reference document for European funding programmes such as LEADER and the European Agricultural Fund for Rural Development (EAFRD). It has been used by developers and tourism businesses to shape their investment and projects, and it has been an important factor in securing investment into the county from a wide range of sources including the Regional Growth Fund, the Rural Development Programme for England and the Coastal Communities Fund.

The plan, and the process behind creating and maintaining it, has been held up as an example of best practice by VisitEngland. This recognition has ensured that Durham has received investment and support at the national level. The success it has had in bringing forward physical and experiential product has helped the county become recognised as one of England's attack brands.

Having a tourism management plan in place has provided impetus and direction for everyone in the county with a stake in its success as a visitor destination. It has ensured the sector has gained credibility and recognition as one of the top drivers of the county's economy.

In late 2015, Visit County Durham, the organisation charged with managing the Durham Tourism Management Plan, embarked on a process to update the plan. The result is this document which presents a refreshed set of priorities and actions that will carry the county forward and ensure that it continues to attract more people to visit the county and, when they get here, that they have the best possible experience.





# Context

**The Durham Tourism Management Plan exists in a national, regional and local context that is constantly changing. Until recently, it was a destination interpretation of the VisitEngland Strategic Framework for Tourism in England, articulating how Durham could contribute to the achievement of national targets including 5% year on year growth and creation of 225,000 jobs.**

VisitEngland has been revising the framework to produce a growth strategy for tourism in England, and the revision of Durham's Tourism Management Plan was timed to take account of any new targets or priorities at national level. However, in early 2016, the growth strategy has been side-lined in favour of the Government's 5-point plan for tourism<sup>1</sup> and the creation of a new action plan for England has been announced.


More change at the national level was signalled in November 2015 when, alongside a positive financial settlement for the national tourism agencies and the announcement of a new £40m Discover England Fund, the Comprehensive Spending Review also required a significant reorganisation at national level. In 2016 VisitBritain and VisitEngland will once again become a single integrated agency and government policy will focus less on domestic tourism and more on international markets with the aim of growing levels of export income earned from tourism. As a destination with relatively low levels of international visitors, Durham stands to benefit from this new direction but it will have to look to its own resources and domestic partnerships to continue to attract visitors from across the UK.

Regionally, the visitor economy of North East England has a relatively low profile in strategic plans. However, it is referenced in the North East LEP's strategic economic plan and is one of the sectors that is targeted for investment from the £10m European Agricultural Fund for Rural Development administered by Department for Environment, Food and Rural Affairs (DEFRA). The Northern Tourism Alliance, a grouping of the North East's destination partners, remains strong and comes together to lobby for the sector and act as a sector board for a range of partners in the North. Through Visit County Durham, the county plays an active role in the alliance.

Within the county there has been major progress on developing a place narrative and brand designed to differentiate the county for a range of external audiences, from investors to business relocators, entrepreneurs to students and academics as well as visitors. Durham's refreshed tourism management plan takes account of this new brand and seeks to support its development. Tourism continues to be an important sector for growth, recognised by the county council through its regeneration statement and in a range of frameworks and strategies concerned with economic development and growth. Importantly, the county retains an agency dedicated to growing the volume and value of the visitor economy, supported by the local authority Durham County Council, as well as a significant number of visitor economy partners and tourism businesses.

<sup>1</sup> [www.gov.uk/government/news/new-plan-to-drive-tourists-beyond-london](http://www.gov.uk/government/news/new-plan-to-drive-tourists-beyond-london)

# The vision for Durham as a visitor destination



‘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.’

## Three objectives will help the county achieve its vision. They are:

1. That by 2020 Durham will offer a visitor experience that matches or exceeds the best offered by England’s premier county destinations.
2. The county will fulfil its potential as one of England’s lead destinations, attracting visitors to the region from across the UK and from target overseas markets.
3. By 2020 the county’s visitor economy will account for 17% of the county’s economy. This will represent an increase of £111.4 million from £752 million (2014) to £863.4 million in 2020. Using the national (VisitEngland) and regional standard (£53k = 1 FTE job), this would create 2,101 additional jobs by 2020.

# The value of the visitor economy

## Durham (2014)

- The visitor economy is currently worth over **£752 million** to Durham (2014).
- **1.43 million** overnight tourists visited Durham in 2014, spending £308 million or 41% of the total expenditure.
- More than 16.71 million day visits were made in the area, accounting for **£444 million** or 59% of the total expenditure.
- Tourism supports more than **10,800** full time equivalent (FTE) jobs in the county.

## North East England (2014) – Local Enterprise Area (LEP)

- In 2014 the North East attracted **6.59 million** overnight visitors. **57.8 million** day visits were made to the region.
- These visitors brought in **£3.85 billion** to the regional economy.
- These visitors support over **55,000 FTE jobs** in the region (4.5% of regional jobs) while the visitor economy contributes 5.9% to regional Gross Value Added (GVA) - Office of National Statistics (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 cafés.
- 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 in England was worth more than £106bn, equivalent to around **8.2% of UK Gross Domestic Product**.
- **2.6 million jobs** are supported by tourism.
- In 2014, GB residents took more than 92.6m overnight trips in England, spending just over **£18bn**.
- **29.8 million international visitors** visited England in 2011, spending just over £19bn.
- The UK's top five inbound markets in 2014 were France, Germany, USA, Irish Republic and Spain.



# 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 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. 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, such as the Discover England Fund, are likely to insist on partnership bids. Key partnerships for the county are: England's Heritage Cities, the Northern Tourism Alliance, VisitEngland and, looking ahead, VisitBritain, northern Destination Management Organisations (DMO) and regional/national protected landscape partners.

**Basing decisions on evidence:** 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 Durham nationally; and studies into particular aspects of supply and demand, for example accommodation.

**Ensuring growth is sustainable:** the principles of sustainable tourism 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 **V**isitor, the **E**nvironment, **R**esidents and **B**usinesses. Durham has been recognised nationally by VisitEngland as an example of best practice in terms of WISE Growth.





# Target markets and visitor segments

**By shaping our product around and aiming promotional activity at people who like what we offer and already visit in good numbers, we are most likely to retain our existing visitors and grow both the volume and value of our visitor economy.**

Durham is fundamentally a heritage and countryside destination. Heritage is the product that visitors most closely associated it with. Between 2012 and 2015 the county has made progress in broadening its appeal to attract a wider range of visitor types that value good food and drink, countryside and culture.

Conversely, the county is drawing more and more of its visitors from within the North East and less from more distant areas of England, the UK and overseas. This has had an impact on the number of day trips to the county which have increased while the number of staying visits has remained almost static.

Over the next four years the county must redouble its efforts to attract visitors from a wider geographical area; in particular those that have easy road and rail links from areas such as the South East and the Midlands. People travelling longer distances are more likely to stay overnight.

In terms of visitor segments, both product and promotion should be aimed at the segments that value what the county offers and who are higher spenders overall. These segments are: Cosmopolitans, Traditionals and Discoverers. More detailed profiles are provided in the appendices.

# Priorities 2016–2020

Eight priorities have been identified as relevant to Durham’s future success. They are based on extensive research and market intelligence as well as wide-ranging consultation with businesses, partners, communities and stakeholders. They are interdependent to a considerable degree and overall success depends on making progress in each area of work.

## 1 Lengthen the amount of time that visitors spend in the county

Durham will do this by focusing on packaging product and taking a visitor-centric approach to the provision of visitor information. Packages will combine rural and heritage experiences and focus on themes that our visitor segments like.

## 2 Improve the quality of the visitor experience post-arrival

Identified by stakeholders as one of the most important areas of work, this priority involves taking visitor needs into account when decisions are being made about provision of services that contribute a quality experience; including car parking, toilets, signage, footpaths and cycle paths, and transport. There will be an emphasis on maintaining the public realm to a high standard particularly in visitor hotspots, improving visitor welcome and providing excellent customer service.

## 3 Differentiate Durham for external audiences

Differentiation will be achieved by utilising the destination and place brand, interpreting it into hooks and stories for external audiences that are important to growing the visitor economy including consumers, the travel trade and journalists.

## 4 Attract new staying visitors to the county

Digital platforms, including social media, will be the principle way that the destination will be promoted to national and international audiences. Promotion will make the most of events that have national pulling power. Campaigns will highlight the county’s product strengths in heritage, arts and culture, and walking and cycling, and be aimed at visitor segments most likely to respond to this offer.

## 5 Retain existing day visitors to the county

Activity will focus on the provision of information on Durham’s borders and in neighbouring destinations. It will build on the success of the county’s Visitor Information Network taking information to visitors where they are most likely to need it and providing it in formats that they prefer to use. There will be a new focus on cross promotion within the county and with regional partners.

## 6 Address seasonality

Events and targeted promotion are the main ways that the county will address seasonality. Events that fall into the shoulder seasons will be prioritised for investment and marketing support ensuring that there are reasons to visit at quieter times of the year. Promotion will be targeted at visitor segments that are free to visit outside of the main season.

## 7 Develop new product and support existing product strengths

The focus for product development will be in areas where the county is already strong: walking and cycling and heritage, as well as an emerging strength in arts and culture. Niche product within these themes will be developed to broaden and deepen the offer, e.g. railway heritage and nature tourism including geo-tourism and astro-tourism.

## 8 Improve Small and Medium-sized Enterprises (SME) and micro businesses performance

Improved digital connectivity is the main way that Durham will go about supporting tourism businesses to increase their profitability, particularly the SME majority and those in rural areas. Improving access to finance is a second strand of activity under this priority to help businesses upgrade and adapt their offer so that they better meet customers' needs.



# Actions 2016–2020

Priority	Rationale	Actions	Lead/Champion
<b>1</b> Lengthen the amount of time that visitors spend in the county	Longer stays increase the amount of money visitors spend on a trip. More spend translates into support for more jobs. Value of average day visitor = £19.70. Value of average staying visitor = £161.48.	Create new county-wide packages that offer 48- and 72-hour short breaks.	Visit County Durham
		Work with the travel trade to get more Durham packages into their programmes.	Discover Durham
		Provide good quality information using channels and locations that are easy and convenient for visitors.	All tourism businesses
<b>2</b> Improve the quality of the visitor experience post-arrival	If visitors have a great visit they are more likely to return and to recommend to their friends and family. Research shows that there is a direct correlation between quality of visit and level of spend.	Increase the number of front-of-house staff in tourism businesses that hold a World Host accreditation.	Visit County Durham
		Address littering, particularly in countryside areas and other visitor hotspots.	Durham County Council
		Ensure that visitors' needs are taken in to consideration when setting clearing regimes, particularly in visitor hotspots.	
		Develop visitor-friendly public transport options that connect the county's main visitor attractions to its gateways and main visitor centres.	
		Improve signage to aid visitor orientation.	
		Ensure there are sufficient visitor-friendly car parking arrangements in major towns and at visitor hotspots.	
		Extend retail and hospitality businesses' opening hours beyond 5pm and into Sundays and bank holidays.	
<b>3</b> Differentiate Durham from its competition	All destinations operate in a global environment, particularly with so much information available to consumers online. To attract visitors a destination must stand out from the crowd and be clear about what it offers.	Use the place brand and narrative in promotional materials.	Visit County Durham
		Develop the county's food and drink reputation by focusing on local sourcing, products native to the county and exemplars in food and drink production and food and drink retailing.	All tourism businesses

Priority	Rationale	Actions	Lead/Champion
<b>4</b> <b>Attract new staying visitors to the county</b>	Attracting new staying visitors from a wide geographic area will have a positive impact on the value of the visitor economy because staying visitors have a higher value than day visitors. Staying visitors are also more sustainable in environmental terms.	Utilise major cultural and sporting events as promotional platforms to communicate the Durham offer to national audiences.	Visit County Durham
		Maximise the opportunities to reach national audiences by working with partners across England.	
		Maintain a high quality online presence for the destination for pre-arrival planning and develop the digital capability of businesses to engage with consumers via social media.	
		Focus national campaigns on core product strengths in walking and cycling and heritage, targeting promotional messages and using channels that will reach Durham's chosen visitor segments in the South East, Yorkshire, North West and the Midlands.	
		Increase the amount of Durham content used by third parties such as Online Travel Agents (OTAs), tour operators and travel agents.	
<b>5</b> <b>Retain existing day visitors to the county</b>	Day visitors are important to many tourism businesses who rely on them particularly in shoulder and off seasons.	Maintain a county-wide Visitor Information Network as a vehicle to deliver good quality information across the county on the principle of taking the information to the visitor.	Visit County Durham  Regional partners  All tourism businesses
		Develop in-destination information tools including information for mobile devices.	
		Develop mechanisms and activity that will support cross promotion and referral between tourism businesses in the county.	
		Develop activity that will support cross promotion with neighbouring destinations.	
<b>6</b> <b>Address seasonality</b>	Businesses that are busy all year round are more profitable and can invest more in their product and their staff. This investment can improve the visitor experience.	Promote events that fall in the shoulder and off seasons creating packages that will generate short breaks at quieter times of the year.	Visit County Durham  Events organisers  All tourism businesses
		Develop the year round events calendar with particular emphasis on the shoulder and off season.	
		Target campaigns to relevant visitor segments that have a propensity to visit in the shoulder and off seasons.	
		Develop Durham's shoulder season offer through packaging and thematic campaigns.	

Priority	Rationale	Actions	Lead/Champion
<b>7</b> Develop new products and support existing product strengths	It is important to continually refresh the offer for visitors so that they have reasons to visit again and to meet constantly rising expectations. New product helps add breadth and depth to the destination offer and widen the destination appeal to new audiences.	Develop the county's core heritage assets: Beamish Museum, Auckland Castle Trust, and the World Heritage Site.	Attractions  Visit County Durham  Durham County Council  Protected Landscapes partners
		Develop the county's programme of high profile exhibitions at The Bowes Museum and Palace Green Library.	
		Develop the county's family offer at Killhope Museum, Locomotion and Seaham (coastal product) and produce more niche products around railway and mining heritage.	
		Develop a series of circular walks in Durham City to take advantage of the riverside and the World Heritage Site peninsular.	
		Maintain to a good standard the 120 walking routes already identified as visitor-friendly.	
		Develop new walking and cycling routes taking advantage of the county's historic waggon ways and pilgrim routes.	
		Develop at least one walking festival in the Durham Dales so that it is regionally significant.	
		Support Hamsterley Forest to develop its forest experience and become a regionally and nationally significant destination.	
<b>8</b> Improve business performance	Small and Medium-sized Enterprises (SME) and micro businesses form the majority of the visitor economy and they need support to improve efficiency, manage costs and reach new customers. Increasing access to finance for these businesses helps them to provide a quality product for visitors.	Increase the number of businesses that promote themselves online.	Visit County Durham  Business Durham  Durham County Council
		Increase high speed broadband connectivity for small and micro businesses, particularly those in rural areas.	
		Provide online routes to market for small and micro businesses that cannot access high speed broadband directly.	
		Ensure tourism businesses have information about available investment funding and the knowledge and skills to access it.	
		Provide good quality market intelligence about the county's visitor economy to support investment decisions and business performance.	





# 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.

Durham also has high quality countryside that is valued by visitors looking for rural short breaks and holidays. Recent research shows that since 2012 the county has become increasingly associated with countryside, with the Durham Dales name playing an important part in communicating the rural offer.

Durham is becoming increasingly known for its arts and cultural offer. Events have played a significant role in this perception change, in particular the high profile exhibitions at The Bowes Museum such as Yves St Laurent in 2015, the biennial Lumiere Durham and the developing programme of exhibitions at Palace Green Library.

# This section provides more detail on Durham's offer in 2016.

**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:

[A Journey Through Teesdale 9-hole Mini Golf Course](#)

[Adventure Valley Golf](#)

[Alpaca Trekking with Teesdale Alpacas](#)

[Balderhead Reservoir Trout Fishery](#)

[Battlezone Paintball](#)

[Beamish Park Golf Club](#)

[Beamish Wild Treetop Adventure](#)

[Billyjeans Ltd](#)

[Bowes Manor Equestrian Centre](#)

[Bowlees Visitor Centre](#)

[Brancepeth Castle Golf Club](#)

[Broom Mill Day Spa](#)

[Castle Eden Golf Club](#)

[Chester-le-Street Leisure Centre](#)

[Climb North East](#)

[Cocken Lodge Golf Course and Golf Driving Range](#)

[Consett YMCA](#)

[Cow Green Wild Brown Trout Fishery](#)

[Crimdon Pony World](#)

[Deepdale Off Road](#)

[Durham Camra Beer Trail](#)

[Durham City and Houghall Discovery Trail](#)

[Durham City Cycle Hire](#)

[Durham City Golf Club](#)

[Durham Climbing Centre](#)

[Escape Rooms Durham](#)

[Freemans Quay Cycle Hire](#)

[Fury Events Ltd](#)

[Go Fishing with Northumbrian Water – Angling for Everyone](#)

[Golf at Rockliffe Hall](#)

[Grassholme Reservoir Trout Fishery](#)

[Guided Walks](#)

[Hall Garth Hotel Golf Course](#)

[Headlam Hall Country Hotel and Spa](#)

[Headlam Hall Golf Course](#)

[Hole In The Wall Horse Riding School](#)

[House of Colour – Image Consultancy](#)

[Hury Reservoir Trout Fishery](#)

[Iles Tours](#)

[Jubilee Lakes Fishing](#)

[Kingsway Adventure Centre](#)

[LimeHouse Spa](#)

[Lindisfarne Gospels Trail at St Mary & St Cuthbert's Church](#)

[Massive Attack Paintball](#)

[Mo Tech Bikes](#)

[North of England Trike Tours](#)

[Planet Leisure](#)

[Ramside Hall Hotel, Golf Club and Spa](#)

[Real Birder Tours](#)

[Redworth Hall Hotel Spa](#)

[Reservoirs of Baldersdale, Barnard Castle Walk](#)

[Rockliffe Hall Luxury Golf and Spa Resort](#)

[Romalld Kirk, Teesdale Walk](#)

[Roseberry Grange Golf Course](#)

[Seaham Golf Club](#)

[Selset Reservoir Trout Fishery](#)

[Serenity Spa at Seaham Hall](#)

[Shaping Futures – Pilates/Reformer Studio](#)

[Sharpley Golf](#)

[Sharpley Springs Fly Fishery](#)

[Skydive Academy at Peterlee Parachute Centre](#)

[South Causey Inn Activities](#)

[Specialist Cycles](#)

[Stanhope Open Air Swimming Pool](#)

[Supreme Adventure Sports](#)

[Taught in the Wood](#)

[The Beauty Centre Spa at the Durham Marriott Hotel](#)

[The Durham Fly Fishing Company](#)

[The Garage Spa](#)

[The Manor House Hotel Spa](#)

[The North East Outdoor Pursuits Centre](#)

[Top Gear Indoor Karting](#)

[Tunstall Reservoir Walk](#)

[Undersiege Paintball](#)

[Virgin Balloon Flights](#)

[Weardale Off Road](#)

[West Hoppyland Trekking Centre](#)

[Whitegates Equestrian Centre](#)

[Wild North Discovery](#)

[Wolsingham Sports Hall](#)

[Wood n Wheels – Durham and Dales Cycle Hire](#)

[Xplore Britain Cycling Holidays](#)

[YMCA Weardale House](#)

**Accommodation:** There are over 14,000 bed spaces\* (this includes seasonal university accommodation).

Accommodation type	Inspected	Non-inspected
B&B/Guest	57	74
Hotel	24	25
Self-catering	112	135
Caravan & camping	8	31
Campus	1	
Hostel	6	5
	<b>208</b>	<b>270</b>

\*As of January 2016

**Attractions:** There are approximately 70 visitor attractions in the county. The most visited paid for attractions in 2015 (for which there is data) with footfall of more than 50,000 were:

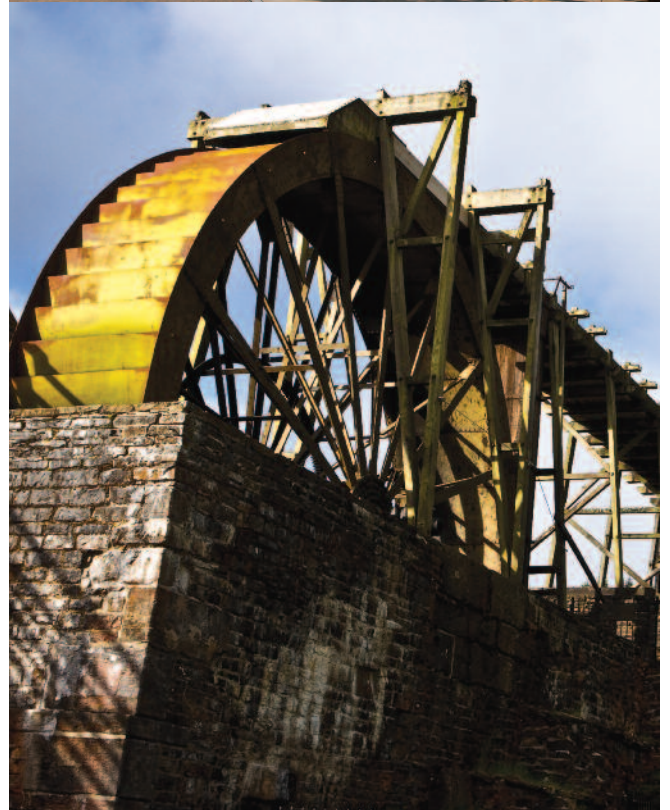
Beamish Museum	671,441
The Bowes Museum	247,236
Adventure Valley	137,000
High Force	111,069
The Oriental Museum	61,589
Raby Castle	60,087
Palace Green Library	54,469

The most visited free attractions in 2015 (for which there is data) with footfall of more than 50,000 were:

Durham Cathedral	853,034*
Locomotion	436,245
Hardwick Park	424,111^
Hamsterley Forest	286,492
World Heritage Visitor Centre	248,113

\*includes visitors and worshippers

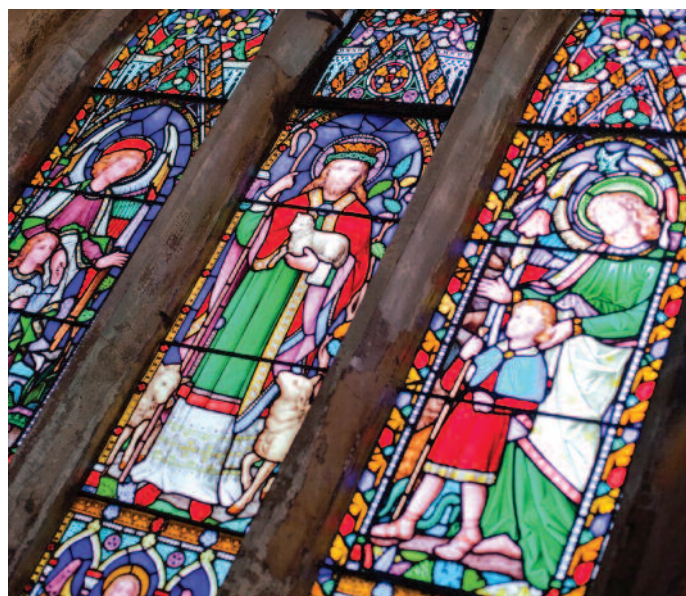
^includes a high percentage of resident dog walkers



**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. Intermittent high profile events such as the Ashes, Lindisfarne Gospels, The Great Goodbye and Yves St Laurent exhibitions are also important for the county's cultural reputation.



**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. More than 70 food and drink businesses have ‘Taste Durham’ accreditation which is a national standard assessment. The county is fortunate in having a Michelin starred restaurant, The Raby Hunt, and several well regarded hotel restaurants including the 3AA rosette Orangery at Rockliffe Hall and the 2AA rosette restaurants at Headlam Hall and The Rose and Crown, Romaldkirk. 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, 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. Sedgefield Racecourse operates around 22 days a year. National cycling events such as the Pearl Izumi Road Race and the Big Bike Ride are more recent additions to the sporting calendar. The county also offers 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 Walney to Wear or Whitby Cycle Route (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 and 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.

# Gaps in the Durham product

**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.



## **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.

**Accommodation:** The 2012 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 proposed gallery in Bishop Auckland devoted to Spanish art will be a welcome addition to the county's cultural 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. The 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, which is in fact 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).



**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.



Lilian Groves, an 87-year-old volunteer senior tourist guide at Durham Cathedral, was named Durham Tourism Superstar 2015 and VisitEngland Tourism Superstar 2016.



# Appendix A

## Durham's target visitor markets – Cosmopolitans, 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 visitor numbers and the value of our visitor economy. Visit County Durham uses a lifestyle visitor segmentation model used by VisitEngland. Wherever possible Durham should seek to develop its product and gear marketing towards these groups.

### Cosmopolitans

- Strong, active, confident and stylish
- Do what they want rather than follow any particular fashion
- Risk takers – a desire for things that are new and different
- They like new challenges, both physical and intellectual
- Life for this group is full and active, but with an appreciation of art and culture
- Comfortable trying new things that are out of the ordinary
- Happy to adopt traditional values when appropriate
- Find it easy to justify buying expensive alternatives
- High-spending market

### Discoverers

- Independent individualists
- Not worried about what others might think
- Little influenced by style or brand unless it represents their personal values
- Value technology, new products, services and experiences
- Function far outweighs style as a purchase driver
- High spenders on what they want – but intolerant of substitutes or image based advertising
- Enjoy intellectual challenges but 'arts and culture' are often negatively perceived
- Value good service – which means enabling them to do what they want
- Live a relatively relaxed pace of life

### Traditionals

- Self-reliant and independent
- Hold traditional values
- Unlikely to justify spending on expensive alternatives
- 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
- Enjoy intellectual challenges, arts and culture
- Relaxed pace of life

# Appendix B

## Partners and consultees involved in the development of the 2016–2020 Durham Tourism Management Plan

Private sector tourism businesses  
(consultation event 04.11.2015)

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Allenheads Trust

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Area Action Partnerships –  
countywide

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Auckland Castle

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Auckland Castle Trust

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Beamish Museum

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Bishop Auckland Town Team

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Business Durham

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Coastal Heritage and Landscape Group

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County Durham Economic Partnership  
– Rural Working Group

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County Durham Economic Partnership  
Board

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County Durham Food Partnership

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Cultural Partnership

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Dalton Park

---

Destination Seaham

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Discover Durham

---

Durham BID

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Durham Cathedral

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Durham City Coaches

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Durham Coast & Lowlands LEADER

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Durham County Council – Tourism  
Internal Working Group

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Durham County Council Economic  
Development & Housing

---

Durham County Council Strategic  
Planning Board

---

Durham County Council Sport and  
Culture

---

Durham County Cricket Club

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Durham Employment & Skills

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Durham Events Forum

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Durham Heritage Coast Partnership

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Durham Indoor Market

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Durham Railway Station

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Durham University, Culture Division

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Durham University, Estates & Buildings

---

Durham Wildlife Trust

---

East Durham College

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Eleven Arches

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Event Durham, Durham University

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Forestry Commission/Hamsterley  
Forest

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Headlam Hall Hotel

---

Historic England

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Killhope

---

Lambton Estates

---

Land of Oak and Iron

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Locomotion

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Lumley Castle

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Natural England

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North East Chamber of Commerce

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North Pennine Dales LEADER

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North Pennines Area of Outstanding  
Natural Beauty AONB Partnership

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North Pennines Area of Outstanding  
Natural Beauty AONB Tourism Working  
Group

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Northumbrian Water

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Radisson Blu

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Rockcliffe Hall Hotel

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Rose & Crown Hotel

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Seaham Hall Hotel

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Stanhope Parish Council

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The Bowes Museum

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The Gates Development

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Upper Teasdale Tourism Network

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Visit County Durham – Durham  
Tourism Management Plan DTMaP  
Committee

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Visit County Durham – Taste Durham  
Steering Group

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Visit County Durham Board

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Visitor Information Network

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Weardale Visitor Network

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World Heritage Site Coordinating  
Committee

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# Appendix C

## Development highlights 2006–2016

Durham has received a number of regional, national and international accolades since 2006. From a low level of recognition at the North East Tourism Awards in 2006 Durham businesses have increasingly dominated, winning the most gold awards of any area in 2013. This has translated into national success with Beamish Museum winning gold at the VisitEngland Awards for Excellence in 2014 and a range of businesses including Event Durham, Dowfold House and Killhope Lead Mining Museum making the national shortlists. In 2014 Visit County Durham launched a local tourism superstar competition. Its first winner, Matthew Henderson from Beamish Museum went on to become England's Tourism Superstar 2015. The second winner of the local award, Lilian Groves, a senior guide at Durham Cathedral, also went on to win the national accolade. Here are some other achievements for the county:

- **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.
- **Durham Heritage Coast** UK Landscape Award Winners 2010 and Special Mention by the Council of Europe for the European Landscape Awards 2011.
- **Durham Cathedral** 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.
- **2nd in the “Best UK City”** Guardian 2011 Travel Awards.
- **Durham** came second in a Guardian readers’ poll on UK favourite city, second to Edinburgh.
- **Durham Cathedral** tops the TripAdvisor list of landmarks.

## Highlights 2006–2016

## Still to come

### Lengthening stay/new product

- Opening of The Wolfson Gallery, Palace Green Library.
  - Opening of the World Heritage Site Visitor Centre.
  - The opening of the Radisson Blu Hotel.
  - The emergence of Crook Hall as a significant attraction and development of the new café and visitor centre.
  - Opening of Palace Green library as an exhibition space.
  - Redesign of the Durham Cathedral shop and café.
  - New dark sky discovery sites are designated.
  - Floodlighting installed at Durham County Cricket Club in 2015 to host more international and evening games.
  - Destination Development Plans produced for Barnard Castle, Bishop Auckland, Stanhope, Seaham, Chester-le-Street, Durham City and Stanley articulating what they are going to do to develop their visitor offer.
  - Auckland Castle Trust formed and wins large investment from Heritage Lottery Fund (HLF) to develop into a visitor attraction.
  - Eleven Arches is formed and secures investment of £24m to develop a new visitor experience.
  - Seaham Marina opens after significant council investment.
  - £2m is spent on developing the Witham in Barnard Castle as an arts, culture and business hub.
  - Development of new galleries at The Bowes Museum include the Metals and Silver galleries and the Ceramics Gallery.
  - A new walking festival is staged in the Durham Dales.
  - A new walking festival is staged in Teesdale.
  - The Durham section of the national coastal footpath is opened.
  - The North Pennines Area of Outstanding Beauty AONB Partnership opens the Bowlees Visitor Centre.
  - Two new food trails in Durham are developed as part of the Northern Lands project.
  - A new network of electric bikes for hire is developed as part of the Northern Lands project.
  - The Forestry Commission opens a new visitor centre and builds a new bridge to give visitors access to more of Hamsterley Forest.
  - Ramside Hall adds 9 new holes to its golf course and opens a new spa.
  - The Morrith Hotel opens its new Garage Spa.
- Durham Cathedral's Open Treasure project part of the Cathedral's £10.5m project to be completed in 2016.
  - Kynren, an epic tale of England due to open in 2016.
  - Development of new 1950s theme (£17m) at Beamish Museum. To be completed by 2021.
  - Auckland Castle redevelopment (£60m) to be completed by 2021.
  - Expansion of Dalton Park (Phase 2) including restaurants, a cinema and a hotel – £40m investment to be completed by May 2016.
  - Coastal Communities Fund investment of £1.74m will develop the harbour infrastructure due for completion in 2017.

	Highlights 2006–2016	Still to come
<b>Visitor experience</b>	<ul style="list-style-type: none"> <li>• Taste Durham quality restaurant scheme launched in 2008, 70 business with a quality mark in 2015.</li> <li>• Know Your Durham Coast – 38 new ambassadors, 68 participants in training programme.</li> <li>• Know Your North Pennines – 59 individuals and 41 businesses benefited from a total of 196 training days.</li> <li>• Welcome to Durham identified as an innovative new product on the national stage. 111 graduates of the scheme by 2015.</li> <li>• Better information for the visitor around quality as a range of quality marks are incorporated into online visitor information.</li> <li>• Durham’s Visitor Information Network is established and wins bronze at the VisitEngland Awards for Excellence in the Information provider of the year category.</li> <li>• 95% of visitors to the county rate visitor information provision as good or excellent.</li> <li>• Durham County Council establishes a multidisciplinary officer working group to tackle delivery of the tourism management plan.</li> </ul>	<ul style="list-style-type: none"> <li>• Taste Durham enters its 7th year in 2016.</li> <li>• Welcome to Durham enters its 4th year in 2016.</li> <li>• Durham Tourism superstar enters its 3rd year in 2016.</li> </ul>
<b>Distinctiveness</b>	<ul style="list-style-type: none"> <li>• Launch and roll out of Durham’s first destination brand – This is Durham.</li> <li>• Durham organised into four visitor focused areas for promotional purposes: Durham Dales, Vale of Durham, Durham City and Durham Coast.</li> <li>• Sonnet 43, Durham Gin and a range of microbreweries become established and win national awards.</li> <li>• Lumiere Durham is held in 2009 and in alternate years up to 2015 showcasing the distinctive heritage of Durham City.</li> <li>• Beamish Museum becomes the most popular attraction in the North East and is named VisitEngland’s 2012 Large Visitor Attraction of the Year.</li> <li>• Seven market towns produce Destination Development Plans defining their unique selling points.</li> <li>• The Durham brand is animated nationally through a £450k VisitEngland investment to market Durham across the UK.</li> <li>• Gastronomy Economy brings together 15 local producers with visitor attractions, eateries and visitor accommodation providers.</li> <li>• The Lindisfarne Gospels exhibitions showcased the World Heritage Site and the history of the county.</li> <li>• Durham County Cricket Club has a string of county championship wins putting the county on the sporting calendar.</li> </ul>	<ul style="list-style-type: none"> <li>• Auckland Castle and Kynren set to become a nationally important visitor attraction highlighting Durham’s heritage and telling the story of England.</li> <li>• Roll out of place brand.</li> </ul>

Highlights 2006–2016		Still to come
<b>Seasonality</b>	<ul style="list-style-type: none"> <li>• Lumiere Durham and the Mystery Plays were staged in 2009 in the shoulder seasons.</li> <li>• The county’s annual programme of events focuses on the shoulder seasons including the Durham Book Festival, the Bishop Auckland Food Festival, the Pearl Izumi Road Race and the Durham City Christmas Festival.</li> <li>• The majority of national marketing campaigns take place in the spring or autumn.</li> <li>• Durham focuses on marketing to visitors that can visit outside of the main season.</li> </ul>	
<b>Profile</b>	<ul style="list-style-type: none"> <li>• Lumiere is staged 4 times with increasing national and international profile each time. People in Australia report seeing it on national TV.</li> <li>• Virtual Lumiere was played by 1,500 people from many countries.</li> <li>• Lindisfarne Gospels 2013 welcomed visitors from over 50 countries and is covered by national BBC Breakfast on its opening day. It generated enormous national and international media coverage.</li> <li>• The Regional Growth Fund invested £450k in promoting Durham across the UK. The county launched its first national marketing campaign and was profiled online, in broadsheet newspapers and at Kings Cross and Edinburgh Waverley train stations.</li> <li>• Durham County Cricket Club staged its first Ashes Test bringing the county to worldwide attention.</li> <li>• The Olympic torch event visited Durham City and the county.</li> <li>• A new Wainwright Walk is waymarked in the Durham Dales.</li> <li>• Beamish Museum wins best large visitor attraction at the national England Excellence Awards.</li> <li>• The Bowes Museum stages exhibitions by internationally famous artists and designers including Vivienne Westwood, Gerald Scarfe and David Hockney, culminating in the internationally important exhibition of the work of Yves Saint Laurent.</li> <li>• Rockliffe Hall gains 5 stars and The Raby Hunt gains a Michelin Star.</li> </ul>	

	Highlights 2006–2016	Still to come
<b>Business performance</b>	<ul style="list-style-type: none"> <li>• Visit County Durham launches a new contact centre to provide a booking services for small businesses.</li> <li>• The destination website reaches £1m unique visitors a year driving enquiries to the county’s accommodation providers.</li> <li>• More of the county’s businesses adopt online booking.</li> <li>• Occupancy in the county’s B&amp;Bs goes from 42% (2010) to 54.99% (2015).</li> <li>• Occupancy in the county’s self-catering properties goes from 46% (2010) to 57.72% (2015).</li> <li>• Occupancy in the county’s hotels goes from 62% (2010) to 79.76% (2015).</li> <li>• Footfall at Beamish Museum goes from 417,592 (2010) to 671,441 in 5 years.</li> <li>• Footfall to attractions goes from 5,581,792 in 2013 to 5,657,356 in 2015.</li> <li>• 342 Taste Durham quality assessments since 2010.</li> <li>• 111 front line staff undertake the Welcome to Durham training programme gaining GNVQ level 2 in customer service and a World Host accreditation since 2013.</li> </ul>	

## Resources for development

Summaries of the studies below are available for reference. The complete documents may be available on payment of an administration fee depending on ownership and issues surrounding commercial confidentiality.

- **Headline attraction feasibility study for Durham City**
- **Retail distinctiveness study for Durham City**
- **Group Travel study for Durham City**
- **Study on the future of Millennium Place to include visitor economy**
- **City feasibility study for conference and meetings market completed**
- **2nd study on meetings focusing on Millennium Place Durham City completed**
- **County Durham accommodation study, supply and demand**
- **Visitor volume and value studies 2006–2014**
- **Occupancy trends for visitor accommodation**
- **Footfall trends for visitor attractions**
- **Destination Development Plans for Durham City, Seaham, Barnard Castle, Stanhope, Bishop Auckland, Chester-le-Street and Stanley**

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