



A DESTINATION MANAGEMENT PLAN FOR NORTHUMBERLAND

10 years of sustainable tourism development 2022-2032

northumberland

A ten-year plan. Monitored quarterly. Reviewed annually.
A destination managed sustainably.

A DESTINATION MANAGEMENT PLAN FOR NORTHUMBERLAND

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PART ONE:

EXECUTIVE SUMMARY AND CONTEXT

Destination Management is a process of leading, influencing and coordinating the management of all the aspects of a destination that contribute to a visitor's experience, taking account of the needs of visitors, local residents, businesses and the environment.

This Destination Management Plan is equivalent to a strategy and action plan for regenerative tourism in a destination. It is a shared statement of intent to manage Northumberland over a stated period of time, articulating the roles of the different stakeholders and identifying clear actions that they will take and the apportionment of resources.

This DMP will set a strategic direction for Northumberland over a period of up to 10 years, and contains prioritised actions within an annual rolling programme, identifying stakeholders responsible for their delivery.



Our vision is to create an environment in Northumberland for tourism and the visitor economy to develop and flourish sustainably, maximising benefits and combating negative impacts, for the benefit of local communities, businesses, visitors and the natural environment.

Our development approach is built on the principles of regenerative tourism. Regenerative tourism actions and interventions support our industry to make our destination more accessible, inclusive and sustainable. It ensures tourism is regenerative, driving value for local people and places as well as the tourist. This plan will focus on activities taken by visitors, businesses and all of those active in the visitor economy to minimise the negative environmental and social impacts of tourism, and to enhance the economic and cultural benefits for visitors, businesses, and host communities.

This is further expanded within this DMP to meet the delivery objectives within the pathways of the North

East Regenerative Visitor Economy Framework. This framework will be detailed further within the plan, but in essence reflects both supply-side and demand-side factors that contribute tangibly towards the regenerative impacts of the places and communities in which it operates. There are obvious synergies between this plan and the framework and our visitor management ambitions can be evidenced by applying its principles. All actions within this plan are intrinsically linked to this Framework and can evidence delivery against these objectives.

All actions and activities will work towards lessening the impact of tourism on the environment and local culture. Through responsible

tourism development, we will offer compelling, accessible and inclusive visitor experiences and/or developments that contribute positively towards the sustainability and regeneration of places, provide benefit and reduce the impact on local communities and which offer compelling, accessible and inclusive visitor experiences.

We are focused on all activities contributing towards the whole region becoming low/zero carbon or offer net positive impacts in carbon reduction, and our regenerative actions will be monitored through delivery within each priority of the plan.

KEY PRINCIPLES AND STRATEGIC AIMS



As a destination, all partners will support and uphold key principles:

1. Sustainability will be at the heart of everything we do.
2. Our actions will be inclusive and equitable, respectful of local residents and the communities in which they live, and of benefit to visitors.
3. Our partnership will be diverse, collaborative and solution focused for the greater good.
4. All partners will be advocates for the county.

Destination Management Plan strategic aims

- To be a successful, integrated destination providing a high-quality and distinct visitor experience.
- To be a tourism destination which is respectful of the needs of the economy and communities, local people, and the natural environment.
- To create an environment where the tourism industry can develop/ increase its contribution to the Northumberland economy.
- To be an environmentally responsible destination.

PRIORITIES AND OUTCOMES

Destination Management Plan priorities:

1. Data, Evidence and Intelligence

Understanding the destination, current position and opportunities. Effectively collating and using data and intelligence to future proof activities, to support destination and product development, to identify and respond to issues and to identify business and market opportunities.

2. Destination Infrastructure and Connectivity

Identifying development needs and opportunities and supporting the sustainable expansion of the visitor economy; and ensuring Northumberland is accessible for visitors and those active in the visitor economy.

3. Position and Profile

Sharing expertise and impact to strengthen Northumberland's position as a leading tourism destination.

4. Business, Product and People Development

Providing businesses with the tools and evidence to improve, develop and focus their businesses and people to ensure the highest quality business provision, skills, service and welcome.

Destination Management Plan outcomes:

1. A fully functioning evidence and intelligence hub will be in place bringing together all partners that sets the direction for all actions.
2. A formal action planning group is developed which oversees all elements of destination development and can act as a rapid response group for tactical issues.
3. A shared communications strategy with clear roles and responsibilities across all partners.
4. Businesses eagerly and proactively respond to evidence led opportunities to improve their business and develop their people.



PART TWO: INTRODUCTION



INTRODUCING THE CONCEPT OF A DESTINATION MANAGEMENT PLAN

Destination Management is a process of leading, influencing and coordinating the management of all the aspects of a destination that contribute to a visitor's experience, taking account of the needs of visitors, local residents, businesses and the environment.

A Destination Management Plan (DMP) is a shared statement of intent to manage a destination over a stated period of time, articulating the roles of the different stakeholders and identifying clear actions that they will take and the apportionment of resources.

The DMP will in turn shape and determine the priorities for Visit Northumberland's own operational delivery plan.

The priorities which emerge from developing the DMP will be shared across the destination and focus all activity in developing Northumberland as a tourism destination.

VISITENGLAND GUIDANCE STATES:

A DMP is equivalent to a strategy and action plan for sustainable tourism in a destination. There should be no difference in how such documents are drawn up and what they address, whatever they may be called.

DMPs should cover all the fundamental aspects of destination management, including tourism performance and impacts, working structures and communication, overall appeal and appearance, access, infrastructure and visitor services, destination image, branding and promotion (marketing), and product mix – development needs and opportunities. Also, recognising the need to protect the integrity of the host communities, including their livelihoods and culture, as well as conserving the natural and built heritage

that significantly underpins the visitor experience here in Northumberland.

Typically, a DMP should:

- Set a strategic direction for the destination over period of up to 5 years.
- Contain prioritised actions within an annual rolling programme, identifying stakeholders responsible for their delivery.

Great destinations are great places to live and work as well as to visit. If they are well managed, they are more likely to generate 'wise growth' in their visitor economy, maximising the benefits of that growth in long term, additional income and jobs.

The best-managed destinations can also attract new investment, keep value-added jobs, bring in new talent and stimulate innovation. Maximising the benefits of that growth in the long term will generate additional income and jobs.

Because every destination has different challenges, opportunities and stakeholders to work with, there can be no one size fits all for destination management. Creating a strategic vision and joint plan, via a DMP, can help unite organisations, acting as a shared statement of intent to manage, develop and promote a destination over a specific period of time.

A DMP identifies the roles of the different stakeholders, sets out clear actions and allocates resources.

A DMP FOR NORTHUMBERLAND

By developing a DMP, Northumberland will have a plan which maximises resources by bringing together the organisations in the public, private and voluntary sectors, which deliver services to and interact with the visitor economy.

A clear and joined up DMP will co-ordinate the whole range of activities aimed at strengthening the quality of the visitor experience and the performance of businesses, and effectively develop processes to manage and monitor the range of impacts tourism has on society and the environment.

This DMP will identify the key priorities so that all resources are used effectively, and ensure that action plans are deliverable and agreed to by key

partners, strengthening the case for funding and projects for support. The priorities for action which arise from the development of this plan will maximise opportunities and provide solutions to any barriers. Stakeholder sign up to the priorities will ensure these are supported across the region by Visit Northumberland, the industry and private and public partners alike.

A partnership approach to destination management will mean that the visitor economy in Northumberland is developed to positively impact on the quality of life of residents and for the wider local economy (improved restaurants, attractions, arts and entertainment) to visit and enjoy. It will also provide a joined up and positive profile for the county to support

attracting new business and investment across all sectors.

It is important that these priorities are connected, and not delivered in isolation as there is a clear connection between each one in their implementation.

VISITOR MANAGEMENT IN A CHANGING VISITOR ECONOMY LANDSCAPE

Visit Northumberland is the Local Visitor Economy Partnership (LVEP) accreditation by VisitEngland. It secured LVEP status in February 2023 following a comprehensive review of the tourism landscape commissioned by Government with the objective of improving delivery structures across England.

The de Bois Review made a number of recommendations, not least that the landscape be simplified to allow more efficient communication between Government and industry via a newly established network of LVEPs be established, managed and guided by Visit England.

In parallel, the recommendation also proposed a regional partnership approach to grow the visitor economy and help develop regional visitor

economy eco-system. The ambition was to create a series up to 15 Destination Development Partnerships across England, bringing together a collection of regional LVEPs to better inform decisions in relation to levels of product development, skills, business events, business support, accessibility and sustainability via regional investment strategies.

Each Destination Development Partnership would be led by an LVEP on behalf of a wider region to create a programme of activity funded by the Department for Culture, Media and Sport and managed by VisitEngland to deliver the government's Tourism recovery Plan ambitions.

Government largely agreed to take forward the proposal of the de Bois review, implementing the new

structures for LVEP delivery, and announcing funding to progress a pilot DDP. Government chose the North East as the pilot region – to be led by NewcastleGateshead Initiative in partnership with Visit Northumberland and Visit County Durham.

The primary objective of the Destination North East DDP pilot and resulting 10-year Investment Strategy were to demonstrate the untapped potential of the North East visitor economy to grow with an ambition to double the value of the regional visitor economy. This pilot structure was established in March 2023 with £2.25million funding to run to March 2025. The wider ambition is for this structure to be rolled out across the country from April 2025 onwards.

A PARTNERSHIP APPROACH FOR NORTHUMBERLAND'S DMP

Visit Northumberland has led the development of this DMP, working with partners, stakeholders and the wider industry, to create a roadmap for destination development.

Visit Northumberland developed five industry led post-COVID sector forums (Accommodation; Attractions; Outdoor, Recreation and Environment; Hospitality; People and Place) to ensure a coherent approach to the DMP and have engaged with other stakeholders via themed summits, questionnaires and one to one debates.

In adopting an industry-led approach, the sector groups have become an integral part of the destination management planning process. Group members are drawn to represent the geography and diversity of the respective

sector, reflecting the range of quantity and quality of product and appeal to the destination's core visitor segments.

Common Terms of Reference have been established and adopted for each of the groups, and Chairs appointed from within each sector. The chairs of the sector groups and key stakeholders will form an overarching DMP Board, with an agreed champion, to work through the priorities, actions and implementation of this plan. This will ensure a consistent approach to development and monitoring as the DMP moves forward.

In addition, the team have commissioned the development of best practice case studies, which reflect business improvement in key areas – Learning, Innovating and Investing.



PART THREE:

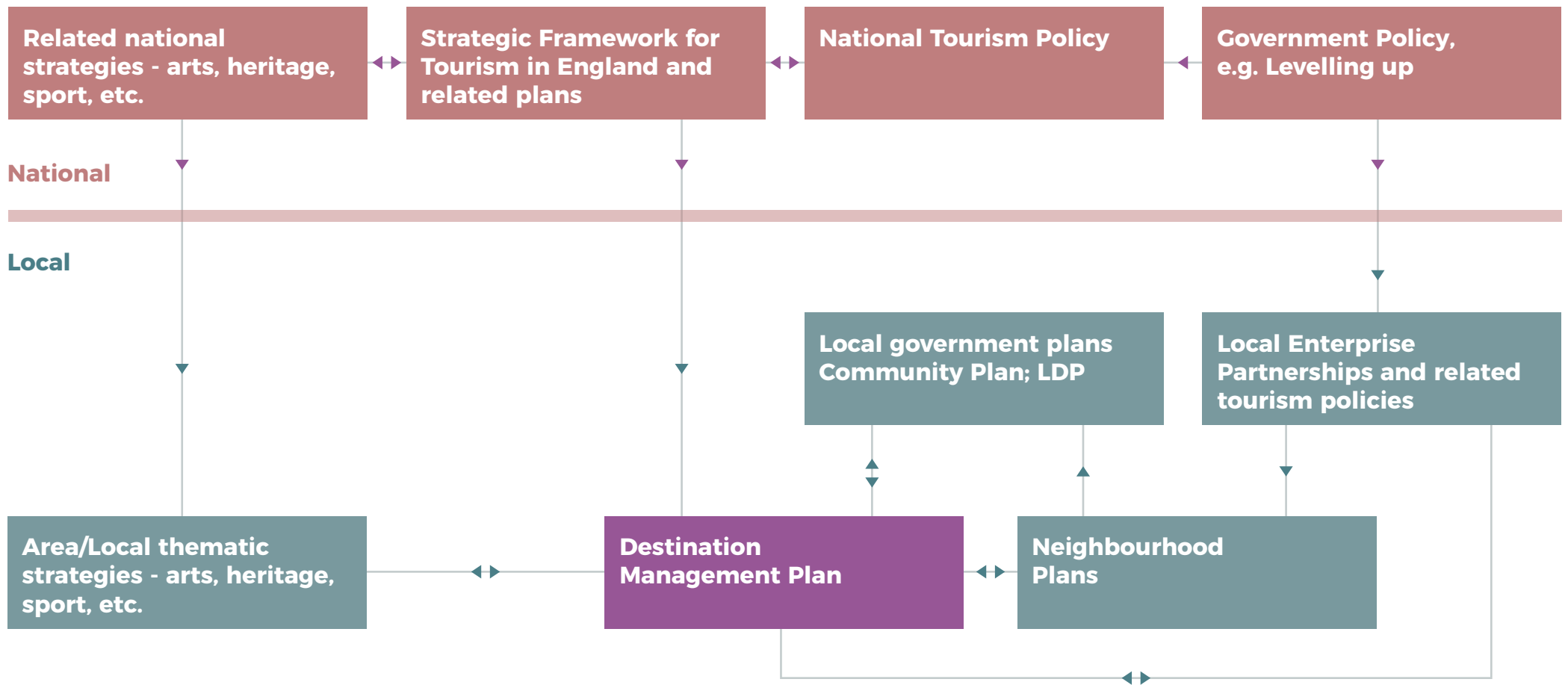
STRATEGIC AND POLICY ALIGNMENT

This DMP will identify how the full range of partner and local authority policies and services (in planning, transport, environmental management, leisure and recreation, culture and the arts) can support the visitor economy on the one hand and be supported by it on the other.

The DMP is not a policy driven document. Visit Northumberland is the custodian of the document for the Northumberland visitor economy and the DMP has been established through a process of information gathering and understanding and referencing a wide range of external priorities. The structures created in the development of the DMP – via the Board and Action Planning Groups – support this intent and ensure the voice of the public and private sector entities involved in the operation of the visitor economy are considered.

Priorities outlined will be driven by the sector feeding in their views and success will be determined through this process of listening, influence and lobbying. This will ensure that the visitor economy is integrated into activities and recognised as a core contributor to economic development.

THE NATIONAL, REGIONAL AND LOCAL PERSPECTIVE



STRATEGIC IMPORTANCE OF TOURISM - THE NEXT FIVE YEARS

Visit Britain/Visit England 5-year strategy aims “To make tourism one of the most successful and productive sectors for the UK economy” with the ambition of attracting 49million visits by 2025, spending £35billion.¹

In June 2021, and in response to the COVID pandemic, the Government published its Tourism Recovery Plan. An Oxford Economics report predicts tourism in the UK will only return in full to 2019 levels of volume and expenditure by 2025. The Tourism Recovery Plan sets out the role that the UK government will play in assisting and accelerating the tourism sector’s recovery from COVID-19. It also sets out a framework for how the government will work with the sector to...

- Recover domestic overnight trip volume and spend to 2019 levels by the end of 2022, and inbound visitor numbers and spend by the end of 2023 – both at least a year faster than independent forecasts predict.
- Ensure that the sector’s recovery benefits every nation and region, with visitors staying longer, growing accommodation occupancy rates in the off-season and high levels of investment in tourism products and transport infrastructure.
- Build back better with a more innovative and resilient industry, maximising the potential for technology and data to enhance the visitor experience and employing more UK nationals in year-round quality jobs.
- Ensure the tourism sector contributes to the enhancement and conservation of the country’s cultural, natural and historic heritage, minimises damage to the environment and is inclusive and accessible to all.
- Return the UK swiftly to its pre-pandemic position as a leading European destination for hosting business events.

¹ Visit Britain/ Visit England 5 year strategy (Jan 2020)



REGIONAL CONNECTIONS

Northumberland is part of the North East Tourism Alliance and has a strong collaborative partnership working approach with NewcastleGateshead Initiative and Visit County Durham, the region's other DMOs, as well as other Local Authority tourism and events delivery teams.

In partnership with the North East LEP, the alliance has created a Statement of Intent outlining the vision for the development of tourism in the North East of England and investment opportunities in the regional visitor economy with a series of ambitions and interventions to set out a 10-year path from 2021.

REGIONAL CONNECTIONS

Visit Northumberland is contributing to this plan, and the Northumberland Destination Management Plan and its resulting priorities will remain a vital strategic tool for visitor management contributing to the delivery of these pan-regional priorities.

In 2021, UK Government commissioned an Independent Review of Destination Management Organisations (DMOs) with the aim of strengthening the tourism delivery infrastructure in England, leading to strengthened collaboration and investment.

Key findings of the review found that the Government should bring coherence to England's DMO landscape and a tiered approach of lead destinations and attributed tourist boards be adopted, funded centrally via Visit England.

If the review recommendations are accepted and implemented

by Government in 2022, Visit Northumberland, alongside other north east DMOs NewcastleGateshead Initiative and Visit County Durham will become accredited Tourist Boards.

The north east also has the potential to be positioned as one of a group of top-tier areas working in partnership with Government to secure new investment into the region through the continuation of existing collaborative regional structures. Having established a lead organisation partnership structure, the three north east DMOs could collectively apply to form a North East Destination Development Partnership with a wider network of partners such as the NELEP, NTCA etc.

There also remains the prospect of an expanded combined authority and access to funding from the UK Shared Prosperity Fund. The seven north east local authorities could agree a region-

wide devolution deal that would see Northumberland, Newcastle City and North Tyneside councils joined by Gateshead, Sunderland, South Tyneside and Durham to create a combined authority for the north east. Both opportunities would herald a new regional ambition and unlock additional funding, powers and resources as part of the Government's wider levelling up agenda.

A future North East Destination Development Partnership or expanded combined authority, focusing on delivering the skills development, inclusivity, innovation and sustainability agendas of the Statement of Intent, provides opportunity for the north east to secure access to funding and strengthen its work, further strengthening the profile of Northumberland.

REGIONAL CONNECTIONS



REGIONAL CONNECTIONS

Northumberland has a strong track record of collaborative partnership working with NewcastleGateshead Initiative and Visit County Durham, the region's other LVEPs, as well as other Local Authority tourism and events delivery teams.

The Northumberland Destination Management Plan and its resulting priorities will remain a vital strategic tool for visitor management contributing to the delivery of these pan-regional priorities.

Evolution to the delivery of regional Government is also a significant contributory factor to the growth of the visitor economy. The North East Combined Authority (NECA) was formed on 7 May 2024 led by an Elected Mayor and Cabinet and cover the seven local authority areas of County Durham, Gateshead, Newcastle, North Tyneside, Northumberland, South Tyneside and

Sunderland. The North East Combined Authority Trailblazer Devolution deal is built on programmes of work which focus on seven Portfolios. Its purpose is to champion the full potential of the North East region through five commitments of

- A fairer North East
- A greener North East
- A connected North East
- An international North East
- A successful North East

NECA has identified the enormous potential the visitor economy holds and will deliver and fund a diverse portfolio of activity that seeks, through partnership with stakeholders, to maximise the potential and talent of our region's people, cultural organisations, creative businesses and tourism assets.

The visitor economy investment strategy developed through the Destination North East DDP pilot is embedded as the NECA priority.

A future Destination North East Development Partnership or expanded role in its delivery played by the combined authority will provide consistency in delivery, focusing on delivering the skills development, inclusivity, innovation and sustainability agendas of the Statement of Intent, provides opportunity for the north east to secure access to funding and strengthen its work, further strengthening the profile of Northumberland.

A REGIONAL PERSPECTIVE

Destination North East DDP has been a catalyst for change and has provided the foundations for a ten-year plan that will double the value of the visitor economy in ten years, in parallel with the North East Combined Authority trailblazing devolution deal.

This growth plan is underpinned by a regenerative tourism framework that will ensure the sector is environmentally and socially sustainable, inclusive and accessible to all. In a groundbreaking initiative to reshape the tourism landscape and promote purposeful growth, Destination North East England launched its Regenerative Visitor Economy Framework

Co-created with the involvement of over 200 stakeholders across the industry, the framework sets out a shared understanding of regenerative tourism in North East England. It will empower LVEPs, local authority tourism teams and other organisations engaged in destination management, to develop

strategies that will support the visitor economy on its regenerative journey.

The Regenerative Visitor Economy Framework focuses on five key pathways:

1. Decarbonise the industry and adapt to climate challenges.
2. Foster thriving local businesses through innovation and sustainable supply chains.
3. Invest in people to create inclusive employment opportunities and skills development.
4. Connect people and communities with improved, inclusive infrastructure for enhanced and active mobility, and digital access.
5. Restore nature, landscapes, culture, and heritage by investing in recovery and revitalisation projects, reducing pollution, and managing access, as well as creating accessible innovative products and experiences.

These pathways are supported by five cross-cutting enablers, which include good governance and collaboration, diversified sustainable funding, insights and data-led decision-making, inclusive training and development, and dynamic engagement.

This comprehensive approach not only aligns with the North East's net-zero emissions target but also aims to rejuvenate the local economy, reduce poverty, create quality jobs, and ensure a more equal and prosperous future for all by making the region a model for regenerative tourism. The framework is designed to inform and guide the North East's broader 10-year visitor economy strategy, ensuring that tourism development contributes to overall economic and social objectives. Visit Northumberland will continue to shape the delivery and the framework's evolution and will come to underpin the delivery of the actions within this DMP.

NORTHUMBERLAND PERSPECTIVE

Tourism is cited in a number of Northumberland County Council's (NCC) strategic plans, for example, the NCC Corporate Plan, the Local Transport Plan, the NCC Local Plan, the Cultural Strategy.

It is noted that tourism development is reliant upon, and supports, the effective conservation and stewardship of local heritage and the natural landscape.

The interdependency helps to create attractive places and experiences for residents to enjoy and sustains services, new employment and commercial opportunities.

NORTHUMBERLAND COUNTY COUNCIL CORPORATE PLAN

The Corporate plan identifies that Tourism is important to the County economy and recognises that there is potential, with careful management, to attract more visitors to stay longer, at all times of the year, and spend more; highlighting NCC's commitment to growing the tourism sector sustainably, to retain the integrity of our communities, and conserve our rich natural and cultural heritage.

Additionally, there is priority to ensure tourism delivery is focused and value-for-money and that NCC support the right conditions to create economic growth, working with the County's attractions, hospitality businesses, and other partners to deepen the range and quality of the visitor experience. NCC also recognises the need to evolve and grow local areas, whilst retaining and deepening their appeal, to ensure that residents are proud to live in distinctive vibrant places.

NORTHUMBERLAND COUNTY COUNCIL ECONOMIC STRATEGY

Northumberland County Council's refreshed Economic Strategy places strong emphasis on inclusive and sustainable growth across the County. Developed in collaboration with local and regional partners, the strategy is aligned with the North East Combined Authority's Local Growth Plan and the Government's Industrial Strategy.

While recognising that growth across all sectors is vital for long-term stability, the strategy highlights the particular

importance of the foundational economy - the backbone of local employment and community well-being. This includes the visitor economy, which alone employs over half of Northumberland's workforce. In 2024, the visitor economy contributed £1.48bn in GVA and supported more than 14,600 jobs. Alongside the foundational economy, the strategy also identifies opportunities in highly productive sectors and emerging industries aligned with the UK's Industrial Strategy, helping to strengthen and diversify Northumberland's economic base.

The visitor economy is recognised as a key driver of place-based growth. Opportunities to strengthen and diversify the sector include investment in digital platforms, infrastructure, and integrated tourism offers. By building on its resilience and leveraging ongoing investment, the visitor economy can cement its role as a catalyst for sustainable, inclusive growth - particularly in rural areas - and shape Northumberland's long-term economic future.

NORTHUMBERLAND COUNTY COUNCIL STRATEGIES

THE NORTHUMBERLAND LOCAL PLAN

This is an integral part of the local authority's Development Plan, upon which all planning applications need to be determined in accordance with.

It will:

- Set the strategic planning policies of NCC, taking account of key factors including population trends, economic growth, climate change, resources and environmental character;
- Set the general scale and distribution of new development which is required to meet Northumberland's needs to 2036;
- Provide the planning principles, including detailed 'development management' policies to guide decisions on planning applications;
- Show in detail where new homes, workplaces and facilities will be located through allocations of land; and

- Show key environmental designations and include site specific proposals for the conservation and enhancement of historic and natural assets.

The Local Plan has eight strategic objectives: economy and jobs, homes, environment, connections, community health and wellbeing, climate change, resources, and quality of place. The outcomes of these objectives will contribute to the plan's vision:

By 2036:

- Northumberland's physical and cultural identity will be conserved and nurtured; its resources will be utilised in a sustainable way. The breadth, scale and quality of its special, varied landscapes and biodiversity will be conserved, enhanced and increased. The quality of its buildings and spaces will be conserved and improved. New development will be well designed, minimise environmental harm and reduce the effects of climate change.
- The economy will be thriving and competitive and deliver more and

better jobs. Supported by investment and infrastructure, building on existing strengths whilst diversifying and realising the potential of the rural and visitor economy.

- The health and wellbeing of the county's people and communities will be safeguarded by continually improving education and skills, and ensuring access to decent, affordable homes, services and facilities is secured.

The DMP will align with the local plan and work with the relevant stakeholders to deliver the aims and objectives which will positively contribute to the development of the tourism economy.

NORTHUMBERLAND COUNTY COUNCIL STRATEGIES

NORTHUMBERLAND NEIGHBOURHOOD PLANS

Northumberland's Neighbourhood Plans give communities the opportunity to shape and define how their area should grow and change in the future. All policies and strategies represent the needs of the local community and parish or town councils set out planning policies for the development and use of land in their area. Within this context, tourism development must be reflected in, and reflective of, the priorities of these neighbourhood plans, before being considered within the wider local authority planning and Local Plan perspectives.

NORTHUMBERLAND COUNTY COUNCIL CLIMATE CHANGE ACTION PLAN 2021-23

NCC intends to reduce CO2 emissions produced in the county, it is clear in its aspirations that the actions of visitors and businesses is integral to drive a cultural shift. Projects will fall into seven priority action areas: Council Policy, Engagement and Partnership, Heating Existing Buildings and New Buildings, Transport, Renewable Energy Generation, Natural Resource-Based Carbon Sequestration, and Reducing Waste.

NORTHUMBERLAND CULTURAL STRATEGY 2018-2030

Placemaking and Identity is a key goal of the Northumberland Cultural Strategy, with emphasis placed on celebrating landscape and built heritage for the future. Creative industries and tourism are placed at the heart of a vision to create a strong and dynamic cultural sector and maximising the profile of Northumberland's distinctive cultural identity for local audiences and national/international tourists is a specific priority, whilst at the same time, ensuring that the cultural identity and integrity of Northumberland remains strong and authentic.

NORTHUMBERLAND COUNTY COUNCIL STRATEGIES

NORTHUMBERLAND TRANSPORT PLAN 2011-2026

A thematic transport strategy has been developed for each of NCC's goals for transport. For each strategy, the key issues facing tourism and the proposed interventions that are relevant to addressing the challenges are presented.

Theme 1: Supporting Sustainable Economic Growth targeted at congested and growing urban areas, inter-urban corridors and supporting sustainable tourism. This includes overcrowding on the rail network in peak periods; limited network coverage of local bus services for rural communities; and inadequate coach parking facilities in town centres.

Theme 2: Reducing Carbon Emissions to minimise the environmental impact of transport. To meet this goal, Northumberland will work in partnership with other organisations to encourage and enable more sustainable travel choices and to strengthen our networks against the impacts of climate change. A key issue to address is that tourists are reliant on the private car to get to Northumberland and travel around, contributing further to CO2 emissions.

Theme 4: Quality of Life to ensure that transport helps to improve the quality of life for all. To meet this goal, the council will work in partnership with other organisations to integrate transport with other schemes and initiatives to improve streetscapes and the urban environment. Specific areas include initiatives which will increase the value of walking and cycling tourism to the local economy; improvements to the rights of way network; the range, type and accessibility of information available about Northumberland's rights of way network for local people and visitors; and promoting the use of the existing public transport network to assist exploration of the countryside.

NORTHUMBERLAND COUNTY COUNCIL STRATEGIES

'OUR WAY' - THE NORTHUMBERLAND WALKING AND CYCLING STRATEGY

The 'Our Way' strategy sets out Northumberland's ambition to encourage more people of all ages and circumstances to walk and cycle more often. The strategy prioritises the development of walking and cycling networks that support the needs of everyone, including, networks in main towns that encourage more people to choose to walk or cycle for regular journeys; traffic free, family- friendly circular routes and links to where people want to go (including visitor attractions, country parks and other recreational areas) and long distance recreational and specialist trails.

NORTHUMBERLAND PHYSICAL ACTIVITY STRATEGY

Remaining active is vital to physical and mental health. This strategy advocates the importance of physical activity in our daily lives, whether we are at home or on holiday. The Northumberland physical activity strategy offers opportunities for visitors to remain active during their time in the County.

STAKEHOLDER STRATEGIES

NORTHUMBERLAND COAST NATIONAL LANDSCAPE MANAGEMENT PLAN

The Northumberland Coast National Landscape management plan is a statutory document which aims to protect the special qualities and characteristics of the National Landscape. The plan recognises that whilst tourism is important, it also puts additional pressures on the landscape and identifies that a balance needs to be struck between developing the visitor economy and maintaining the special qualities.

NORTH PENNINES NATIONAL LANDSCAPE MANAGEMENT PLAN

The North Pennines National Landscape management plan maps out how it will “conserve and enhance” the natural beauty of the area. It is committed to developing a sustainable visitor economy which supports tourism whilst protecting the environment.

STAKEHOLDER STRATEGIES

NORTHUMBERLAND NATIONAL PARK STRATEGY

Ensuring visitor satisfaction is key to the National Park. It aims to increase the number of visitors through improved communication and infrastructure and making the most of its built on four special qualities of a sense of tranquillity, rich cultural heritage, distinctive landscape character and a place rich in biodiversity and geology. The vision for the 2022 National Park Management Plan states that: "Northumberland National Park will be a place where people and nature can thrive. As a living working landscape the National Park will lead the way on climate action, with resilient communities, enabling an accessible and welcoming park for all."

The Management Plan strategic themes of Thriving Communities, Nature Recovery, Climate Action, Culture and

Heritage, and a Welcoming Park have been agreed as core to the future of Northumberland National Park.

These themes are fully integrated within the ambitions of the North East Regenerative Visitor Economy Framework.

KIELDER WATER AND FOREST PARK DEVELOPMENT TRUST

Kielder Water and Forest Park Development Trust is a registered charity working at Kielder to promote sustainable development, provide recreational facilities, improve knowledge of the natural environment and encourage the arts.

In development is a significant programme of works which will aid the preservation, conservation and the protection of the environment and the

prudent use of natural resources in the surrounding area, add to the variety of core attractions at Kielder Water and Forest Park, ensure there is more for visitors to experience as well as providing extra employment and business development in the area.

STAKEHOLDER STRATEGIES

FORESTRY ENGLAND

The environmental, social and economic objectives of Forestry England's management of sites in Northumberland are detailed in each location's plans. They balance conservation, landscape and recreation values with the constraints of both the current high risk of windthrow and its future management. Maintaining public rights of way and access to recreation are common to each. Eight Forest Plans exist for Cheviots, Fourlaws, Harbottle & Holystone, Harwood, Kielder, Rothbury, Slaley and Thrunton Beat. These forests make a considerable backdrop and welcome one million visits per annum across the county.



PART FOUR:

THE VALUE OF TOURISM

Tourism is a \$1,482bn global industry - and that's just expenditure by tourists travelling internationally and does not include domestic travel. It's a successful industry; arrivals have been growing on average by 5% over the last 10 years. Europe is the world's most successful region receiving 51% of all global arrivals.

Often under-valued, tourism is also a success story for England – the number of international visitors has increased by over 26% in the last decade. Overnight stays by UK and international visitors are worth around £45bn, rising to over £100bn when we include day visits.

Visit Britain estimates that in 2018 tourism contributed **£106billion** to British economy (direct and indirect impacts) and supported **2.6million jobs**. The same report identifies there are **28,880 VAT registered businesses** in tourism sector (2011); 33,374 serviced accommodation offering 786,775

bedrooms and 1,768,795 bedspaces, and 31,845 non-serviced accommodation businesses offering 1,401,716 bedspaces.²

VisitBritain forecasts 38.7 million inbound visits and £32.5 billion spend in 2024, showing an increase in inbound visits and spend overall to the UK compared to 2023 levels, although with varying rates of recovery and growth across its major inbound visitor markets. Compared to 2023, this represents growth of 2% in visits and 5% in nominal spend (2% in real spend). This follows final results of 38.0 million visits

and £31.1 billion spend in 2023, 93% and 109% of 2019 levels respectively (spending 90% in real terms) largely driven by the United States with record-breaking spend by American visitors in the UK in 2023.

The pace of recovery from Europe slowed as 2023 progressed with spending, in real terms, remaining just below 2019 and China, the UK's second most valuable inbound market in 2019, continued to build back with visitor numbers.

TOURISM'S CONTRIBUTION TO THE NORTH EAST

Tourism has far-reaching benefits for North East England too. It creates and sustains the visitor economy bringing money into the region - money that circulates and benefits the whole area, not just the primary destinations. It enables front-line businesses to become more profitable and to invest, and it encourages start-ups. To give a sense of scale, in 2023 staying and day visitors to the North East spent £5.4bn.

Tourism adds £1.2bn GVA per annum to the regional economy and contributes a similar number of jobs as other leading sectors including construction; information and communication; professional, scientific and technical services; and transport and warehousing.

The latest tourism data for the North East suggests that, since the pandemic, the visitor economy is recovering quicker than expected with the economic

impact of the sector in 2022 up by 37% on 2021 levels to now be worth £5.4 billion – the first time it's exceeded £5 billion since 2019.

Although overall visitor numbers are up by 34% from 2021 at 65.6 million, they are still down 10% from 2019 when we welcomed 73 million people to the region, and the region continues to have the lowest international visitor numbers and spend of any English region.

The sector supports more than 58,000 jobs, with 14,000 more people being employed in the sector between 2021 and 2022, up 32% but still down 7% on pre-pandemic levels – most obviously in hospitality, culture, heritage, leisure, entertainment, meetings venues, events, retail and transport. It also indirectly supports businesses and jobs in the industries that service those sectors, from laundries, food producers and

florists to AV companies, accountants, plumbers, marketing and IT specialists. Despite the acceleration of tourism recovery, figures show that the sector still employs 5,000 fewer people than in 2019.



THE VALUE OF TOURISM TO NORTHUMBHERLAND

The impact of COVID on the tourism sector has been severe. Data for 2020 reflected a sector impacted by over six months of closure and severely impeded trading resulting in a decline in visits, expenditure and employment.

Before the pandemic, there were **10.48 million visitors** to the county generating **over £1 billion**³. This economic impact showed a growth of 57% over 10 years, demonstrating the increasing popularity of the county.

The visitor economy remains as important to Northumberland. Tourism is Northumberland's second largest employment sector and one of the county's key industrial growth opportunities.

The Northumberland visitor economy has seen continued strong year-on-year post-covid growth and in 2023 recorded the highest ever gross value contribution of £1.262 billion to the Northumberland economy, up 7.9% from 2022. Visitor

Economy spend is 20.5% higher than pre-pandemic levels, despite visitor numbers remaining 5.3% lower.

While this represents the highest ever annual value, economic impact remains 5.4% behind pre-pandemic levels when indexed to take inflation and recent cost of living pressures into account.

In 2023, Northumberland welcomed 10.12 million visitors with growth driven by buoyant day visitor numbers which grew by 214,000, or 2.7% in 2023.

This could be attributed to the new attractions at Ad Gefrin and Lilidorie and growth in events such as the Alnwick Winter Light Trail attracting more regional day visits.

Growing tourism sustainably by increasing the number of staying visitors is a priority. They account for 18% of visits, but 65% of spend and 48% of all visitor days.

Tourism's impact extends beyond accommodation and attractions. The contribution of food and drink to the visitor economy remains the most significant to direct economic impact (48.2%) and direct employment (41.8%).

The visitor economy builds a thriving economy and supports our communities. In total, 14,655 jobs are supported by the Northumberland visitor economy making the sector the second largest sector in Northumberland, with tourism and culture being identified as one of the County's six industrial growth opportunities. ⁴STEAM recognises in Northumberland there are 715 serviced accommodation businesses offering 8510 bedspaces, and 1932 non-serviced accommodation businesses with 34,040 bedspaces.

Dark Sky Tourism in and around the Northumberland International Dark Sky Park was calculated to be worth £25 million a year (EIA Research Report by NGI/Witton House Associates 2019)

ECONOMIC IMPACT OF TOURISM IN NORTHUMBERLAND IN 2023



In 2023, the Northumberland visitor economy recorded its **highest ever gross value**



The volume of visitors in 2023 exceeded **10 million** last seen before the pandemic



65% of ALL spend is generated by just **18%** of staying visitors



The direct economic impact of staying visitors has increased by **3.78%**

EMERGING TRENDS

Tourism has experienced huge growth in the last two decades and businesses need to keep evolving to accommodate new technology and the demands of the 21st century visitor. Research has shown that there are some key areas that should be borne in mind:

- Ageless travel – not pigeon-holing experiences based on age
- Use and influence of social media and the internet
- Need for easy booking protocols
- Providing “real experiences”

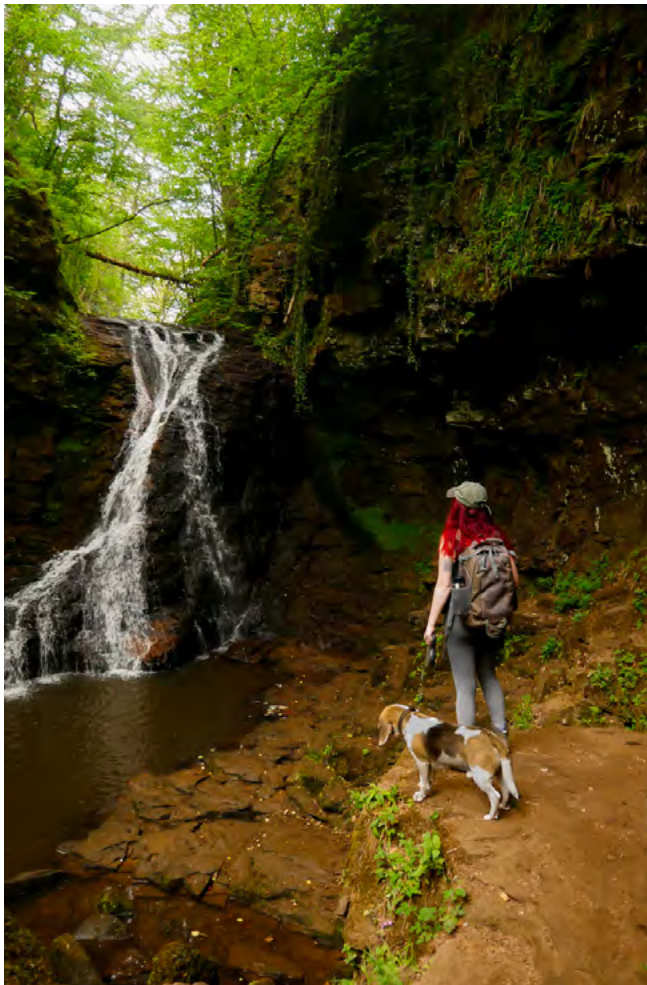
- Use of technology such as AR and VR
- Opportunities for visitors to volunteer/take part in self-improvement activities
- Active outdoor, wellness and health tourism (especially post COVID)
- Intergenerational family group visits
- Generation Z values sustainable travel and authentic experiences
- The COVID outbreak has increased environmental awareness among consumers. Destinations that protect nature, or offer an insider view into natural capital, will attract a steady following as travellers seek to make a positive difference when travelling.

In a leadership role, Visit Northumberland will act as a catalyst for a thriving tourism sector, sustainably growing the value of the visitor economy, as well as encouraging new investment and increasing skills. The organisation will create a new narrative with clear and compelling messages, iconic imagery, and new products, to showcase the destination and attract new and repeat visitors. Visit Northumberland will build strong, meaningful and outcome driven partnerships across the destination, as well as regionally and nationally.



PART FIVE:

DESTINATION AUDIT: CURRENT PICTURE IN NORTHUMBERLAND



This DMP is based on and linked to national, regional and local strategic economic and tourism priorities as well as the examination of data to establish a baseline and targets for the sector.

Having this strong supporting evidence base will enable those involved in the delivery of the DMP to demonstrate their success and to be accountable for making positive changes for our visitors and our businesses.

It is also crucial to understand visitor profiles, motivators and behaviours and how the current product meets, exceeds or requires adapting, to meet customer and destination priorities as we move forward. Actions included in this plan will build on evidence already collected to provide us with a solid understanding

of the product mix and the perceptions of the product; it will also inform our understanding; fill identified gaps and reflect any significant changes over the lifespan of the plan.

This DMP and the associated groups connected in its delivery will encourage and develop regular case studies to show how Northumberland's visitor economy businesses innovate, learn and invest, coupled with regular industry temperature checks via an industry-focused business barometer.

NORTHUMBERLAND VISITOR SURVEY 2021

An online survey undertaken in May 2021 of over 3,000 contacts to Visit Northumberland show that 93% of respondents said they would consider visiting Northumberland for a short break or day trip. 79% of respondents said visiting new and different places is an important factor when choosing a destination to visit and the availability of good accommodation, nature, space, and landscapes are important factors in their decision making. The majority (72%) of people take trips with their partner only. Barriers to visit include the perception that Northumberland is hard to get to/not very accessible. Just over a third over those who have never visited said it was because they weren't sure what Northumberland had to offer.

In 2022 a face to face visitor survey exercise was undertaken in Northumberland with over 450 respondents. Visitors to Northumberland were invited to share their views on the destination to benchmark the perceptions and quality of visitor experience. Key findings reflect well on Northumberland's welcome and quality of experiences - 100% of respondents said they were made to feel welcome on their visit, 99% would recommend Northumberland as a destination to visit and 98% stated they would visit again. 95% of visitors surveyed rated their experience of Northumberland as an 8 out of 10 or above.

8 out of 10 visitors use their own car to travel to Northumberland.

Overnight visitors stayed for three nights in Northumberland, spending £275.79 per trip while day trippers had an average dwell time of almost 5 hours (4 hours 53 minutes), spending on average £41 per trip, both higher than results seen in 2019 STEAM results.

Other key findings highlighted that 16% of visitors are new visitors while more than 30% have been more than 20 times before, with 59% of visitors to Northumberland staying overnight. While general sightseeing and visiting artistic or heritage exhibits came out highly, 41% of visitors said their main reason for visit was to visit heritage sites. Aspects highlighted in need of improvement included parking, more bins, better signposting to seating areas, and there were comments around making the museums and attractions more engaging and interactive.

NORTHUMBERLAND PRODUCT AUDIT

A quality and perceptions-based product audit was undertaken in February/ March 2021 to provide a snapshot of the views of the Northumberland tourism product by the Northumberland tourism industry. Questions covered attributes from quality of accommodation, attractions and food and drink, to what aspects were seen as thriving and what the industry felt were the key priorities for the future.

A key finding is that the county's natural outdoor environment and built heritage experiences were key drivers of Northumberland's visitor economy but were at risk of being hindered by poor infrastructure and lack of new product investment.

The quality of the county's landscape and countryside (92%) and heritage

and culture (83%) clearly stood out as the county's highest rated attributes in respect of uniqueness and out of region draw. However, within this overwhelming support for the outdoors, 46% felt that there were insufficient experiences available. It was also felt that there was an over reliance on traditional aspects of heritage and culture, with opportunity to make more of the authenticity of Northumberland's people and diverse cultural offer, away from the traditional built heritage attractors.

Access and transportation (42%) and Visitor Services (39%) ranked worst in the survey. 98% of respondents felt transport infrastructure needed improving across the board, with emphasis on quality, sustainability, regularity and rural reach a priority. While 97% of respondents stated

warmth of welcome was very important to them and 90% felt visitor services played an important role in supporting this, the quality of parking (45%), toilets (39%) and signage (49%) impacted negatively on these perceptions creating a significant gap to be addressed.

In regard to future priorities, addressing climate change and seasonality, developing new experiences, better coordination and provision for visitors with disabilities were all very highly desired. The full product audit is added as an appendix and this document will be used to inform and advise future development opportunities and priorities of the industry.

BEST PRACTICE EXAMPLES

The COVID pandemic has adversely affected the tourism and hospitality sector. Case studies were developed from 15 organisations who have managed to adapt their businesses, to provide inspiration and support to other local business owners in the region; these case studies showcase those who have found ways to triumph during the pandemic through **Investment, Innovation** and a new approach to **Learning**.



CASE STUDIES



Invest

Hesleyside Huts, a luxury glamping operation in the Northumberland National Park, investing in new, high-quality product to boost post-lockdown demand. The **invest** strand also includes case studies on Restaurant Hjem (Northumberland's destination Michelin-starred restaurant); Thyme to Eat (catering supplier to industry); and Heritage Walks Northumberland (start-up guided walking tour company).



Innovate

Bamburgh Castle, and its ever-growing programme of weddings and events have attracted a new, more engaged audience, and with their expanding portfolio of self-catering accommodation on site and nearby now means they can encourage visitors to stay locally while enjoying all that the castle offers. The **innovate** strand also includes case studies on Laverock Law Cottages (bespoke personal experiences); the Doxford Group's wedding venues (pre-wedding dining and accommodation experiences); and Market Cross Guest House (marketing strategy to welcome back post-lockdown business).



Learn

Kielder Observatory's efforts to attract new audiences through online festivals and outreach programmes. The **learn** strand also includes case studies from Northumberland Country Zoo (online audience engagement and development); and the Inn Collection Group (staff development and training initiatives).

NORTHUMBERLAND BUSINESS BAROMETER



National Trust

In response to the COVID-19 pandemic, Visit Northumberland sought to understand how the industry is performing through the collation of occupancy, visitor numbers, forward bookings and longer-term prospects for the year ahead for their product to understand more about the factors influencing them through a monthly business barometer.

Allied with this work, a weekly temperature check of Northumberland tourism business social media activity allows us to get a sense of feeling from the industry. Anonymised analysis of the survey helped identify trends and patterns to feed into future business engagement and destination management strategies. This scoping presents us with a sectoral awareness and flexibility to identify opportunities and address challenges as they arise.

NORTHUMBERLAND DESTINATION AUDIT

The destination audit considers the strengths of Northumberland, as well as the issues and barriers the destination is facing and the opportunities that present themselves as solutions to support ongoing, regenerative destination development.

An extensive sector-led product perceptions audit was undertaken which included one to one discussions with primary stakeholders, a series of ongoing attraction, accommodation, outdoor, recreation and environment 'sector group' meetings held throughout 2020/21 and regular industry 'temperature check' on activity and performance.

This destination audit serves as the template for development of the partner-led actions in which this DMP will be based. Four priority areas have been identified from this

process and the top strengths, issues and opportunities highlighted in the following areas:

ONE: Data, Evidence and Intelligence

– understanding of the destination, current position and opportunities.

TWO: Destination Infrastructure and Connectivity – understanding the opportunities and barriers to sustainable management of the expansion of the tourism sector and attracting and dispersing visitors in the county.

THREE: Position and Profile – communication of Northumberland's visitor offer and building its profile as a leading UK destination.

FOUR: Business, Product and People Development

- Business development: evidencing how the Northumberland visitor economy is inter-connected, for the benefit of the sector
- Product and Experience Development: actions needed to develop new products and offers to attract new markets
- People Development (Skills, Quality and Welcome): developing businesses, improving the welcome, providing information and improving the visitor experience.

Priority One: Data, Evidence, and Intelligence

The product audit and our overall consultation asked the key questions – where our strengths in evidence and intelligence are and where are we weaker. What do we need to do to ensure that we are collecting the right data and using it effectively. What additional information or data is available to feed into annual evidence collation needed to take priorities forward?

The following strengths, issues and opportunities were raised through our discussions and are outlined below:

Strengths

1. A robust set of historical data evidencing the volume and value of visitor economy to the Northumberland

2. A comprehensive product audit and visitor behaviour and perceptions surveys to better understand the size, scale and attractors of the destination.
3. Regular business data collection and industry activity to feel the pulse of the industry.

Collation of regular STEAM data providing comparable annual data on performance, which can be benchmarked against annual performance and regional competitors.

Solid product audit and visitor survey foundations are in place to better understand the sector in respect of the scale of business operation, sector perceptions and visitor behaviours.

A business barometer and the Visit Northumberland temperature check across social media to understand industry is faring,

based on data provided by industry partners and platforms to disseminate to all stakeholders. Evidence of success for tourism can be easily represented by growth in visitor numbers.

Issues to consider

1. Need to develop a clearer understanding of target markets and ensure these are tracked as behaviours change
2. Need to prioritise ongoing investment in the understanding of the product and sector perception data
3. Need to collate performance data to evidence attainment and destination strategy growth targets

Priority One: Data, Evidence, and Intelligence

There must be a clearer understanding of, and consistent tracking of, customer needs, visitor perceptions, behaviours and motivators, as well as visitor pressure points and restrictions, trends, segments (weddings market, wilderness and outdoor experiences) and target markets in order to plan, understand the county's visit economy product, and to track changes in supply over time.

There is a need to evidence the result of all interventions.

Opportunities

A joined-up approach to data collection and intelligence sharing, will mean the destination will be clear about which markets to aim for and which products/themes/packages to develop for those markets. It will also enable the destination to set appropriate measures such as return on marketing

investment, business growth, satisfaction surveys (particularly when aligned with frequency and topics of other northern LVEPs)

A regular business barometer would provide an understanding of how the industry is performing, gauge business levels, consumer demand and sentiment. Development of wider measures would help to manage the destination and monitor visitor pressure and footfall/flow, monitoring of the environment and heritage at risk.

Engagement with Parish and Town Councils will help with managing community relations and utilise feedback from local communities.



Priority Two: Destination Infrastructure and Connectivity

What is missing in the destination infrastructure? Where are the issues and barriers which are hindering development? Are there any physical infrastructure, planning requirements, opportunities and barriers which impact on the visitor economy?

The following strengths, issues and opportunities were highlighting via the product audit and our general consultation; **we need to reflect on the information outlined below to effectively manage the sustainable expansion of the tourism sector and improve connectivity.**

Strengths

1. Northumberland has good air, sea, road and rail links to all parts of the country.

2. There are many public transport options and national walking and cycling routes linking key destinations and attractions.
3. Regenerative tourism development is a planning priority and acknowledged as an important contributor to the county's zero-carbon ambitions.

Infrastructure links include Newcastle International Airport, the Port of Tyne (ferry services and a strong cruise tourism proposition); excellent rail links via the East coast main line. The A1 A69 and A66 trunk routes add road connectivity from key catchment areas.

Distances from coast to countryside are manageable, served by public and private transport, and supported by an extensive infrastructure of national walking and cycling routes.

Tourism and the visitor economy are woven into key NCC development strategies, providing a balanced and

integrated approach to destination planning. This is important to drive the cultural shift required toward delivering regenerative impacts and ensures communities will prosper from the socio-economic and environmental benefits tourism brings.

Environmental sustainability in respect of managing the impacts on the historic and natural environment can be balanced through a process of consideration of national planning policy, the Northumberland Local Plan and the county's various neighbourhood plans. Integration of tourism development opportunities with these plans will ensure consideration is given in the protection of these natural and cultural assets through existing agreements with bodies such as the Environment Agency, Natural England and Historic England.

Priority Two: Destination Infrastructure and Connectivity

Issues to consider

1. Northumberland has a perception issue in that visitors believe is too far away and too difficult to reach.
2. Visitor pressures create issues with congestion, parking and anti-social behaviours in popular rural and coastal communities.
3. The size of the county and limitation on public transport provision makes it difficult to explore, with visitors reliant on private transport when in the region.

There is a need to improve communication in relation to location, travel times and ease of reach; compared to competitor destination such as the Lake District, Yorkshire or Scotland.

Investment in access, awareness and the quality of the public transport options

from the main transport hubs and popular visitor destinations will tackle levels of poor provision of rural transport services and encourage use as an alternative to the car. More sustainable transport is required in rural areas.

Encouraging parking provision away from honeypot sites should be considered and viable alternative car parking options, such as motorhome/overnight parking, park and ride or shuttle bus schemes should be investigated to reduce congestion, overcrowding problems at peak times and the additional strain this places on local communities.

National Landscape and National Park management plans are central in guiding destination management in Northumberland's protected landscapes. Pressure and anti-tourism sentiment is growing from local communities so

the benefits of tourism infrastructure development must balance with the needs of local communities within the boundaries of those areas, and this experience and insight can contribute to the guidance for other areas outside of their remit.

The lack of short circular walking and cycling routes are a missed opportunity to encourage sustainable transport to and from town and hotspots and encourage visitors away from increasingly popular and overcrowded routes.

Rail and bus services offer limited luggage and cycle storage and rural stations lack effective tourism information and orientation.

Poorly maintained public realm, brown signage and dated toilet facilities are considered a blight in places.

Priority Two: Destination Infrastructure and Connectivity

Opportunities

Opportunities to work in partnership with Newcastle Airport and the Port of Tyne in developing its roster of domestic and international air and cruise routes to boost inbound travel. Cruise Tourism is an area of growth, with shore excursion visits into Northumberland from the Port of Tyne and the development of an offshore cruise berth in Berwick providing access to sites and visitor economy businesses in the north of the county.

The dualling of A1 and infrastructure improvements along other key routes will increase opportunity for people to get to and around Northumberland easier.

Develop clear pre-travel information from [visitnorthumberland.com](https://www.visitnorthumberland.com) and effective welcome and signage strategies

to help visitors plan their travel in advance, interpret the various means of travel and transport options available and design easy-to-use itineraries and seamless travel experiences.

Emphasis must be placed on the development of a longer-term parking plan for popular honeypot sites, and creative solutions sought to develop and promote non-honeypot sites.

Traffic free cycle routes and road surface improvements should be supported, and the development of an extensive network of quiet lanes, byways, bridleways and permissive paths should be explored. Kielder Forest, for example, features the largest off-road cycle network in the UK in one location.

In tandem, undertake a review of the potential of opening the old railway routes (safer routes). Focus

more investment into the Rights of Way network to encourage increased participation in outdoor activities, improve connectivity between towns and foster improved links from long distance routes to visitor economy businesses to encourage spend. Improving access and awareness and investing in the quality and connectivity of the walking and cycling product and packages offer, will foster improved links to accommodation and other service providers (such as drying facilities, cycle storage, business support and promotion).

Investment is required to develop better integration of travel and tourism in rural areas. Further development, extension and consistency of coastal bus services will help develop them into the traffic-mode-of-choice and help alleviate traffic congestion in coastal communities.

Priority Two: Destination Infrastructure and Connectivity

Encourage greater use of public transport. The AD122 Hadrian's Wall Bus is evidence that integration of tourist and domestic transportation is of benefit. Opportunities remain to extend this service, as well as adding new similar schemes to other rural attractions and coastal communities. In addition, it is important to improve coach facilities in Northumberland, priority should be given to town centre locations including Berwick, Morpeth, Hexham and Alnwick.

Integrate businesses with the NCC's climate change action plan; tourism businesses are well placed to support a county-wide EV charging point network to encourage increased usage of electric cars, e-bikes and develop product accordingly.



Priority Three: Position and Profile

How visible is Northumberland? Is the destination at the forefront of visitors' minds – is our location or our profile a positive or negative factor in developing our marketing and profile activities?

The following strengths, issues and opportunities were raised during our consultations and product audit, as mechanisms for partners to work together to effectively communicate Northumberland's visitor offer as a leading UK destination.

Strengths

1. Northumberland has a very strong tourism proposition, with a good range of attractions, destinations and experiences.

2. Northumberland remains one of the last truly uncharted, unspoilt, natural tourism destinations in England. The outdoor proposition is the leading factor considered as making the destination stand out against its competitors.

3. Unique attributes that cannot be matched or bettered anywhere else in the country which gives Northumberland a competitive marketing advantage over competitor domestic destinations.

Northumberland has a very strong tourism offer as England's most unspoilt and beautiful destination with the power to surprise. There is a good mix of attractions including heritage, outdoor, landscape, natural environment; more castles than any other county in England, stunning and predominately under explored coastlines, rich regional

heritage and an array of activity-based attractions. The county's primary attractions (Hadrian's Wall World Heritage Site, The Alnwick Garden, Bamburgh Castle, Alnwick Castle, the Farne Island and the Holy Island of Lindisfarne) have a very strong brand presence. In addition, the most pristine darks skies in England with England's first and largest International Dark Sky Park

The natural environment is strong (National Park, two National Landscapes, two Marine Special Areas of Conservation); over 40% of the county is designated as a National Park, National Landscape, Site of Special Scientific Interest or some other protected status.

The Visit Northumberland brand, website and campaigns maximise existing strengths (dark skies, unexplored coast, world heritage offers) and provides

Priority Three: Position and Profile

enhanced personalisation functionality, late availability search options and opens up retail and wholesale trading opportunities.

Northumberland's award-winning businesses, experiences and accommodation providers offer opportunities to amplify and demonstrate authenticity and establish a unique sense of place.

The Produced in Northumberland scheme, the local food offer and Made in Northumberland marque, provide the provenance, authenticity and sense of place desired by visitors.

The people of the county, and employees in the sector, are an asset; champions for the county within the county advocating and offering a warm Northumbrian welcome.

Issues to consider

1. Northumberland is not communicating its current offer and unique attributes effectively.
2. A consistent, focussed and common destination brand proposition should be adopted by the industry and be widely implemented at stakeholder level.
3. Northumberland's natural and protected landscapes are vulnerable and as a key attractor asset must be protected

There is a need to ensure engagement of the brand proposition with visitor economy businesses to enable effective dissemination of information to their customers. A lack of product knowledge in respect of tourism business operators in relation to the 'Endless Experiences' brand proposition could negatively

impact the position and profile of the destination.

Northumberland is surrounded by strong more easily recognisable and better-known domestic destination competitors. Northumberland is heavily reliant on domestic day visitors and is not seen as a holiday or first-choice short break option; there is a need to shift the balance to overnight, higher spending visitors who will stay longer and explore more. Provision of additional quality, year-round accommodation is needed.

The external perception is that the county is too cold, too dark, too wet, too far from anywhere, remote, with nothing to do. There is an urgent need to differentiate Northumberland from 'the North' and reflect the county's USP - space, unspoilt coast and countryside, dark skies, excitement, desirability and welcome of the people - to inspire consumer confidence.

Priority Three: Position and Profile

There is an appetite from businesses to work together to raise the profile of the destination in a 'the strength of the pack' coordinated and consistent manner. Visit Northumberland, working with its partner businesses and stakeholders, are best placed to lead a consistent, focussed and common brand proposition.

Need to attract newer, younger audiences; new audiences must be targeted, and new products introduced/developed. Communications for these new audiences must be designed to reflect the spectrums of the communications lifecycle, consumer confidence and highlight responsible behaviour messaging through a wider range of media outlets, not just existing channels that new visitors may not use.

Existing and emerging marketing campaign themes should aim to

stimulate demand over the traditional 'closed' winter season to maximise opportunities when the summer and shoulder season demand drops.

With over 40% of the county protected, the natural environment is a resource that needs to be managed and protected in order to increase the economic value of tourism. Alignment with the statutory National Park, North Pennines and Northumberland Coast Management Plans will support their specific objectives towards regenerative tourism and alleviate tourism-related pressures.

Opportunities

Need to emphasise responsible visiting; new audiences and changes in visitor behaviour provide an opportunity to target specific countryside and responsible behaviour messaging.

NCC has pledged to be carbon neutral by 2030 and tourism can play a vital role in reaching that goal – there are opportunities for the tourism industry to be fully supportive and immersed in this opportunity increasing public awareness, conservation and protection of vital resources.

Embrace all opportunities for Northumberland to adopt the principles that drive towards greater sustainability and principles as the first circular economy destination and promote and encourage these principles within the tourism sector. Transformational Tourism - climate, nature and health and wellbeing – is inextricably linked with sustainability, and an opportunity.

There is an opportunity to effectively reinforce the status of Northumberland as a 'green destination', or even a carbon-credit destination by

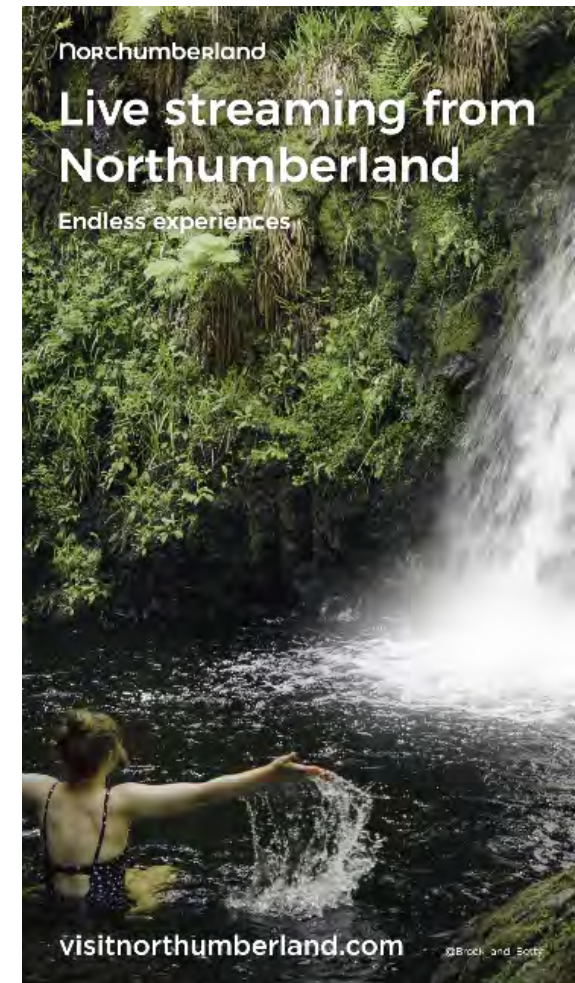
Priority Three: Position and Profile

demonstrating ways of offsetting the carbon-footprint of a visit with support and investment into land management practices to maintain carbon storage. Work towards Green Tourism Accreditation with workshops and shared best practices.

Roll-out the Northumberland brand in partnership, to foster greater ownership and increase reach and impact.

Develop a coherent, and shared, marketing strategy to support the wider visitor economy, linked to the destination key attractor themes and elements. Focus all campaigns on the destination's strengths and have the confidence to reflect the positive attributes and image of Northumberland. Maximise opportunities presented by possible latent demand from 'unspent' holiday entitlements - tactical promotion of short or midweek breaks, thematic and family group getaways.

To ensure Visit Northumberland is in a strong position to be considered for any future national marketing initiatives that may present themselves, the creation of a marketing sub-group would help to address specific challenges and opportunities. This would ensure the industry has the opportunity to contribute ideas that can deliver an impact, while also inspiring new and existing visitors to consider, plan and execute a visit.



Priority Four: Business, Product and People Development

This priority is broken down into three distinct development areas, one around businesses, one around our product and the final one around people development. Business development – what do businesses need in terms of support? What best practice case studies are there? What do businesses want to learn about?

Consultation around the issues and opportunities for business development are outlined below.

Strengths

1. The creation of Visit Northumberland has galvanised a fragmented sector and is recognised as the official Local Visitor Economy Partnership for the county.

2. Visit Northumberland has influence over the local and regional tourism agenda and is well represented at national level.
3. An industry-led partnership approach ensures the interests of the entire visitor economy are represented, and these businesses can benefit from pan-regional and national representation

Visit Northumberland brings together the entire industry through an expanding partnership base and industry led approach to destination development and is accountable to its partners. Visit Northumberland is an active member of the Destination North East Destination Development Partnership and works with a range of partners, destinations and LVEPs. These good working relationships and connections via multi-partner working groups, provide the opportunity to

collaborate, share joint campaigns, and work together on issues and challenges.

Northumberland's collective voice ensures we can partner in regional and national schemes, such as those initiated at Combined Authority, LEP or national tourism board level.

The development of this DMP, with its sector groups and Board means the organisation's industry-led approach ensures full stakeholder buy-in, with those stakeholders acting for the destination and not their own interest.

Priority Four: Business, Product and People Development

Issues to Consider

1. Visit Northumberland is still embedding to be recognised as the strategic tourism planning and management agency for the county.
2. All stakeholders must adopt DMP priorities and understand they are for the benefit of all the county.
3. There must be a shared platform for business intelligence, support and development.

Historically, there has been a lack of a cohesive approach, with stakeholders confused by the multitude of organisations seemingly with responsibility for destination development. Under the banner of Visit Northumberland, there is the opportunity for a voice for the visitor

economy in the region, and for strategic influence locally, regionally and nationally.

Embedding DMP priorities within planning applications to reflect the priorities, challenges and concerns of communities that benefit from or are impacted by tourism. This will counter any growing risk of opposition and resentment caused by an increase in or behaviours of visitors.

Recognise the impacts of tourism on the natural and cultural heritage of the county and the integrity of its communities and use the transformational ability of tourism to make a positive difference to the livelihoods of residents and their environment.

Need to identify areas where support

is needed for business and people development; via an industry-led approach which considers all sizes of business. Monitor and measure any future opportunities and challenges presented by altered consumer behaviour and visitor patterns.

While remote areas and lack of 4G/ Wi-Fi connection are considered a positive to visitors wanting to disconnect and switch off, intermittent signal or prohibitive costs are deemed a barrier to effective business operation to many tourism businesses. Connectivity limitations could deter potential visitors. Poor internet/wifi connections were considered a potential hindrance to the provision of information for visitors, and a barrier to the ability of tourism enterprises to engage effectively with audiences.

Priority Four: Business, Product and People Development

Opportunities

Develop a central B2B hub for partners to share intelligence, case studies, policies, ideas and initiatives; identifying and sharing best practice, to showcase how the destination has evolved to encourage new businesses and innovations in the sector.

There is the opportunity to extend existing strategic alliances to sustain business and enable delivery in different ways by exploring charitable, educational, professional and association channels, not just rely on the established travel industry.

There is a need for investment in infrastructure development, such as rural

high-speed broadband. Museums and attractions have particularly identified IT challenges as a barrier to expanding operations. An improved digital offer is needed to enable attractions to effectively adapt to attract new audiences, grow onsite or online spend, encourage return visits or disperse over-capacity to other attractions. This would include digital access schemes to drive online audiences and funding opportunities available for the tourism sector and development and promotion of virtual experiences - tours, performances, exhibits - will future proof against further restrictions. A shared approach to digital planning can seek out best practise ideas for implementing and monetising.

Priority Four: Business, Product and People Development

This priority is broken down into 3 distinct development areas, one around businesses (as outlined in the previous section), one around **our product** and the final one around people development.

Consultation outcomes to identify possible areas of new product development and how the existing product meets existing and new market needs are outlined below.

Strengths

1. Northumberland's strength lies in a combination of its natural, protected outdoor space and landscapes aligned with its rich heritage offer.
2. Unique thematic attributes allow the destination to shine.

3. The range, breadth and diversity of the county's tourism product and authentic experiences have appeal to existing and new audiences alike.

Our protected landscapes are an asset – our visitor offer is strengthened by the diversity of experiences, quietness, peacefulness, wildlife and opportunity to 'get away from the crowds'.

Thematic presentation of the county, such as the Northumberland International Dark Skies Park, and the authentic experiences associated with it or our family-friendly attractions, dog friendly sites, local produce, famous historical figures, quiet roads for cycling and walking, film and TV/ literature locations, cultural events offer a unique appeal.

The county has a good spread of accommodation types, from small

rural B&B or self-catering cottages to a handful of luxury and spa hotels, holiday parks, camping and glamping sites, wedding venues.

The hospitality sector is growing in stature, with an increasing number of destination pubs, award-winning restaurants and growing independent retail offer, with a variety of high-profile specialist shops such as Barter Books seen as an attraction in themselves.

There is a wealth of products and experiences to meet the needs, demands and interests of different target markets.

Priority Four: Business, Product and People Development

Issues to Consider

1. Northumberland must diversify and adapt its tourism offer to ensure new audiences are attracted and retained.
2. Funding should be prioritised for product and destination development.
3. Product development should be focussed on areas that can provide the biggest impact and make the biggest difference in terms of perceptions and appeal.

There is a need to ensure attractions, experiences and accommodation are available year-round to sustain and maintain demand in the off season; the sector must find new ways of attracting, developing and engaging with visitors.

There is concern that Northumberland doesn't have the right mix of attractions to fully satisfy the 'endless experiences' brand proposition or appeal to newer markets, whether it be wet weather attractions, free attractions, and attractions that would interest teenagers to support the growth in family travel. Funding needs to be prioritised for product and destination development.

Increase promotion of, and advocate for, accessibility provision to ensure the destination is seen as inclusive – work is needed to develop and present a co-ordinated product offer and more needs to be done to allow wheelchair/disabled access to all areas of the visitor economy, including beaches and coastline.

Priority Four: Business, Product and People Development

Opportunities

There is an opportunity for Northumberland to become an exemplar of integrated activity-based provision akin to services provided in other parts of Europe by linking bus, train, car, cycling and walking activities with provision of cycle racks, baggage transfer functionality and on-board interpretation. Encourage and productise opportunities linking walking and cycling guides with accommodation, route creators etc to support businesses (e.g baggage transfer, cycle repair); work with businesses to improve access to cyclist and promote bookable product.

Northumberland has a well-established cultural events network

that brings together a strong base of producers, venues, funders and artists. Opportunities exist to hang promotion and publicity on existing, well attended events and activities and to coordinate the seasonal events programmes between attractions and industry partners.

Diversify from traditional visitor markets and prolong the season by encouraging attractions to stay open longer into the shoulder season. Promote current, and increase, indoor or wet weather attractions and identify ways to take advantage of the staycation boost.

Increase promotion of family travel, events, weddings and celebrations linking businesses with other like-minded brands and products.

Support product development of new accommodation, food and drink, infrastructure improvements, indoor and family attractions through influence and engagement with NCC planning.

Maximise thematic promotion (destination wedding venues, dog friendly, accessible facilities) and increase film and TV production opportunities.

Explore the introduction of a family visitor pass to bring together attractions, provide a packaged product to sell into domestic and international tour programmes and encourage dispersal across the county.

Priority Four: Business, Product and People Development

This priority is broken down into 3 distinct development areas, one around businesses (as outlined in the previous section), one around our product and the final one around **people development**.

This particularly focuses on how we work with business to provide the very best experience for our visitors, how we improve the welcome, provide the right information and enhance the visitor experience.

Strengths

1. The visitor information network is strong, effective and supported by the industry.
2. Quality and the visitor welcome is of primary importance to the tourism sector.
3. The warmth of welcome and the people of Northumberland are considered an attribute and asset that should be more widely utilised.

Northumberland has an effective visitor information service in all major towns, delivered through a shared approach to resource.

The visitor welcome is recognised as important by the industry in the perception product audit, with the warmth of welcome of primary importance to the destination.

The quality of information provision is high where provided, and partner provision also regarded as a vital tool in helping to disperse visitors when in the county.

Friendly people and a warm welcome are an asset, and these people can become very strong advocates for the county. Welcome is not just warm its personal and all contact is based on personality and personal contact.

Priority Four: Business, Product and People Development

Issues to Consider

1. The visitor information network should be expanded to include more locations and adopt new technologies.
2. The quality of visitor service infrastructure in many places is considered a blight, and potentially impact negatively on visitor experience.
3. Tourism in Northumberland is primarily seasonal and jobs in the sector are not seen as a career path offering routes for progression.

Access and availability of information

should be a key consideration across the development of the county's information offer. It is recognised that consumers are now expecting ever increasing levels of engagement in activities, products, services and events, demanding more detailed information to facilitate more authentic experiences. The visitor information network can provide bespoke, tailored and inspirational advice and referrals to encourage regional spread of visitors and benefits.

New audiences are less likely to visit traditional tourist information centres, so information needs to be supplied in formats more attuned to their methods.

Visitor facilities were considered an important aspect but felt to be very poor in the sector perceptions audit, with the quality and availability of parking, toilets and signage impacting negatively on these perceptions.

Tourism not seen as a career path. Partnerships with educational institutions should be developed to inspire a new generation of tourism professionals. Careers in tourism are limited in rural areas, but even when opportunities do arise, there are insufficient people of working age living in the tourist areas willing to take the roles, especially when they are seasonal and offer little career progression.

Priority Four: Business, Product and People Development

Opportunities

Repurpose the tourist information network to provide destination hubs where a wider range of complementary services are provided (Local producer retail hubs, cycle hire, activity meeting points, b2b meeting hubs etc).

Scale the Know Your Northumberland Ambassador programme for staff, residents and employees to become an effective industry training tool.

Develop apprenticeships schemes, coordinated at a sector level, where multiple partners can create a bespoke training and development journey in association with training colleges in Northumberland and across the wider North East region.

Opportunities to share recruitment and awareness of who is recruiting and when, will open up opportunities for candidates and recruiters.

Enhance, expand and promote a knowledgeable, talented and committed volunteering community and develop schemes that allow visitors to 'give back'.



PART SIX:

PRIORITIES AND ACTIONS

From assessing the current position, the product audit and SWOT discussions with stakeholders and the industry, the following themes provide a framework for the direction of travel for all tourism stakeholders working together to provide a strategic lead for the development of the visitor economy.

Within these themes, priorities and actions for implementation are detailed, with information in relation to those who will lead to take this forward.

It is important that:

1. Each action/activity within this action plan is led, managed and developed. The organisation/individual cited in the “lead” column will be responsible to delivery and reporting on the action.
2. This action plan is fluid and can be amended to at any stage if there is an identified need to do so.
3. Northumberland will be an exemplar of regenerative destination management and development and regenerative principles of the North East Regenerative Visitor Economy Framework are a common thread though this DMP. Each action plan priority includes specific regenerative tourism actions.

Priority One – Data, Evidence and Intelligence

OBJECTIVE

Northumberland will have robust evidence and intelligence to inform and shape destination management.

OUTCOME

A fully functioning evidence and intelligence hub will be in place bringing together all partners that sets the direction for all actions.

Delivery under this priority will help to understand Northumberland as a destination, to make informed decisions and to prioritise effectively to ensure resources are utilised effectively.

To have proactive and joined up activities around Evidence and Intelligence means that Northumberland will be focused in all areas of work – from marketing to development – there will be a deeper understanding of the potential of destination, trends, and domestic/ international market development, enabling us to establish what markets provide the best opportunities to increase volume and value of visitors.

It will also provide stakeholders and partners with the knowledge to understand, forecast, plan and react accordingly to changing environments and visitor trends, as well as being able to monitor the value and volume

of visitor economy and maximise its impact on the wider economy of Northumberland. This evidence base will ensure Visit Northumberland is the voice of tourism, with a clear role and influence, on all matters related to the visitor economy both on a local, regional and national basis. Similarly building strong and capable partnerships with businesses and business leaders, through the development, and support, of this DMP will strengthen the impact of the Northumberland Visitor Economy.

Priority Two – Destination Infrastructure and Connectivity

OBJECTIVE

Northumberland will have infrastructure that attracts visitors, aids visitor management and provides benefits to residents and communities.

OUTCOME

A formal place sector group is developed which oversees all elements of destination development and can act as a rapid response group for tactical issues.

This priority will identify opportunities for sustainable management of the expansion of the tourism sector and improve connectivity to address the barriers of the location of Northumberland and how visitors are able to get to and move about in once they arrive. The DMP will link with and influence statutory and strategic NCC policies to ensure that tourism and its needs, and its impact are recognised.

Investment in sustainable Destination Infrastructure and Connectivity actions will focus on the carrying capacity of our visitor infrastructure, transport and utility networks, communities and the fabric of our natural and cultural heritage to support the tourism sector and exploring how tourism development in turn can affect positive change to the quality of life and livelihoods for residents.

Priority Three – Position and Profile

OBJECTIVE

Northumberland will be known as a responsible tourism destination to attract domestic and international visitors.

OUTCOME

A shared communications strategy with clear roles and responsibilities across all partners.

This priority will ensure the messages about the county will be consistent and adopted by all in the visitor economy to reflect the Northumberland brand. Bringing partners together to effectively create a compelling offer and share the Northumberland message is crucial to Northumberland's **Position and Profile**. Telling a new story through tailored marketing messages about Northumberland, which is supported by local businesses and the local community, and targeted at local, regional, national and international audiences.

Priority Four – Business, Product and People Development

OBJECTIVE

Northumberland's visitor economy businesses will thrive in an environment of collaboration and have agility to adapt to every opportunity.

OBJECTIVE

Quality, longer staying visitors, will be inspired by an array of experiences based on a solid understanding of their motivations, needs and wants.

OBJECTIVE

A skilled and knowledgeable visitor economy workforce will stimulate quality improvements and an improved visitor experience.

OUTCOME

Businesses eagerly and proactively respond to evidence led opportunities to improve their business and develop their people.

This priority has three main facets:

- Business development: evidencing how the Northumberland visitor economy is inter-connected, for the benefit of the sector.
- Product and Experience Development: actions needed to develop new products and offers to attract new markets.
- People Development (Skills, Quality and Welcome): developing businesses, improving the welcome, providing information and improving the visitor experience.

Priority Four – Business, Product and People Development

By engaging all businesses active in the visitor economy across the county as Destination Partners, we will create the environment for a thriving visitor economy and industry, focusing on Business Development and improvement which will strengthen Northumberland's tourism industry. The partnership approach to the DMP will enable the alignment and integration of strategies with businesses and agencies working within the visitor economy.

Clear evidence and trend information will focus all elements of Experience Development, the tactical and strategic development of new products through experiences and offers to attract new markets, extend the dwell time and encourage return visits. This will also include support to local producers to create products and experiences which reflect the authenticity and culture of Northumberland.

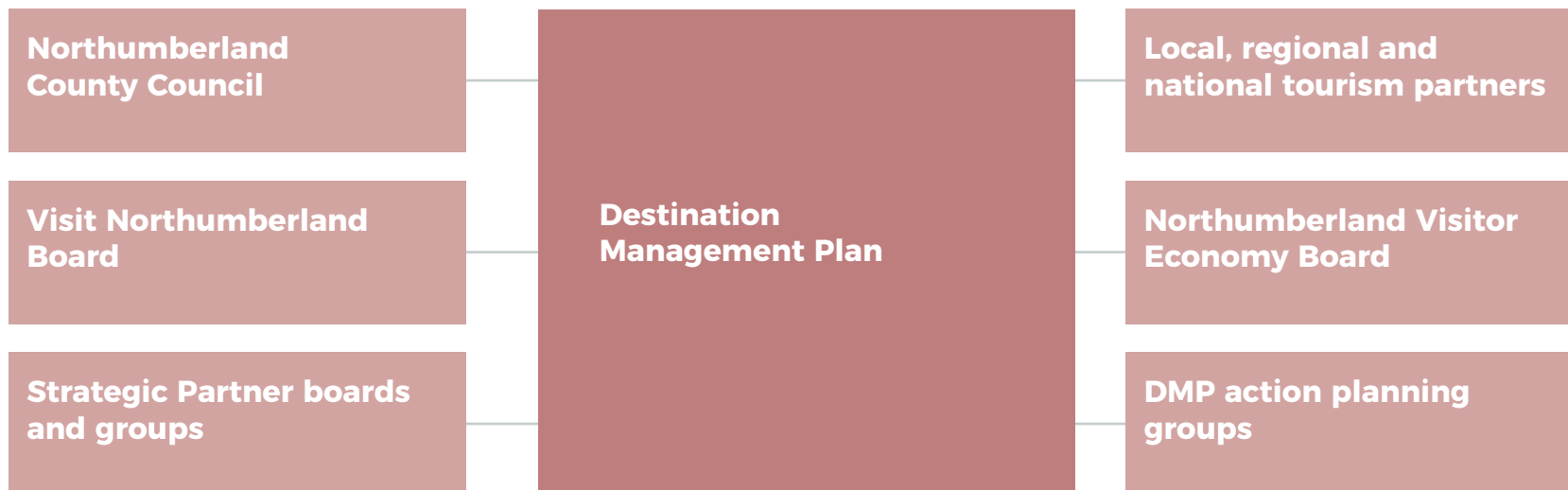
Development and training opportunities must be created to meet the evolving needs of businesses within the visitor economy. Developing careers and people working in, and wishing to enter, the industry will provide the actions within the Skills, Quality and Welcome theme. This will include the welcome provided to visitors, the information they receive and the overall experience, underpinned by a visitor information network which supports businesses and prioritises visitor needs and expectations.



PART SEVEN: MONITORING AND MANAGEMENT

The DMP has a 10-year vision. It will be monitored quarterly and reviewed annually.

It is embedded with the strategic framework of all partners active in its development, its implementation and in the sustainable development of the visitor economy.



MONITORING PROCESS

The actions and priorities included in the DMP will be integrated into the strategic priorities of partners and will ensure a joined-up approach to activity across Northumberland within these identified areas.

The Northumberland Visitor Economy Board will be responsible for monitoring actions and outcomes and reporting this to the key partners and Visit Northumberland Board.

Priority leads and champions to review and confirmations (short, medium and long term)



Creation of specific groups to develop priority action plans



Roles and responsibilities in relation to action plans confirmed



Implementation and activity. Local and regional connections



Reporting outcomes quarterly via DMP Board



Annual review and update



Report to tourism forum annually on activities

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