

**The Peak District and Derbyshire Growth Strategy for the Visitor
Economy
2015 - 2020**

Prepared By:
Jo Dilley
Visit Peak District and Derbyshire DMO

Introduction

The Visitor Economy has been identified by the D2N2 as a key sector within Derbyshire, and has real potential for growth. Not only does it offer both short and long term investment opportunities to help accelerate economic recovery, it also provides long term self-sustaining growth and prosperity.

This plan for growth responds directly to the strategic aims and objectives highlighted in the D2N2 Economic Strategy, and set out below is a clear set of priorities and interventions that will achieve positive outcomes contributing to the overarching target of creating 55,000 new jobs by 2023.

By December 2012, tourism industries accounted for 2.7million jobs in England – or 10% of the total. These included 1.2million full time jobs (7.5% of the national total) and 1.1million part time jobs (14%). Additionally 445,000 people were self-employed in England, underlining the importance of entrepreneurship in the sector. 123,000 more people were employed in tourism industries in December 2012 than in December 2010, a 5% uplift, which compares favourably to 2% growth over the same period in other areas of the economy.

Domestic and inbound visitors spent over £84bn in 2012, a 10% increase on 2011. Since 2010 year on year growth has averaged 8.7% against the projected target of 5%, well ahead of the performance of the wider economy.¹

A strong visitor economy can play a key role in improving the quality of life, strengthening the distinctiveness and ranking of Derbyshire as a place to live, invest and visit. The sector provides significant opportunities to help address issues such as youth unemployment and worklessness through a wide breadth of job roles and upskilling prospects; this is particularly important to areas in the north of the County and Erewash, where unemployment levels are higher than County averages, and can benefit from the creation of jobs in neighbouring districts. Improving the economic outlook for areas with high levels of deprivation is also proven to positively impact on the wider determinants of deprivation including health, crime and education.

This Growth Plan sets out the strategic direction for the visitor economy from 2014 through to 2020 and is the strategic framework for the whole of Derbyshire. This strategy has been developed through consultation with members, stakeholders and Visit Peak District and Derbyshire, in particular with the input from the Visit Peak District and Derbyshire Management Team, who will be responsible for monitoring the delivery of the identified action areas and progress against the targets set.

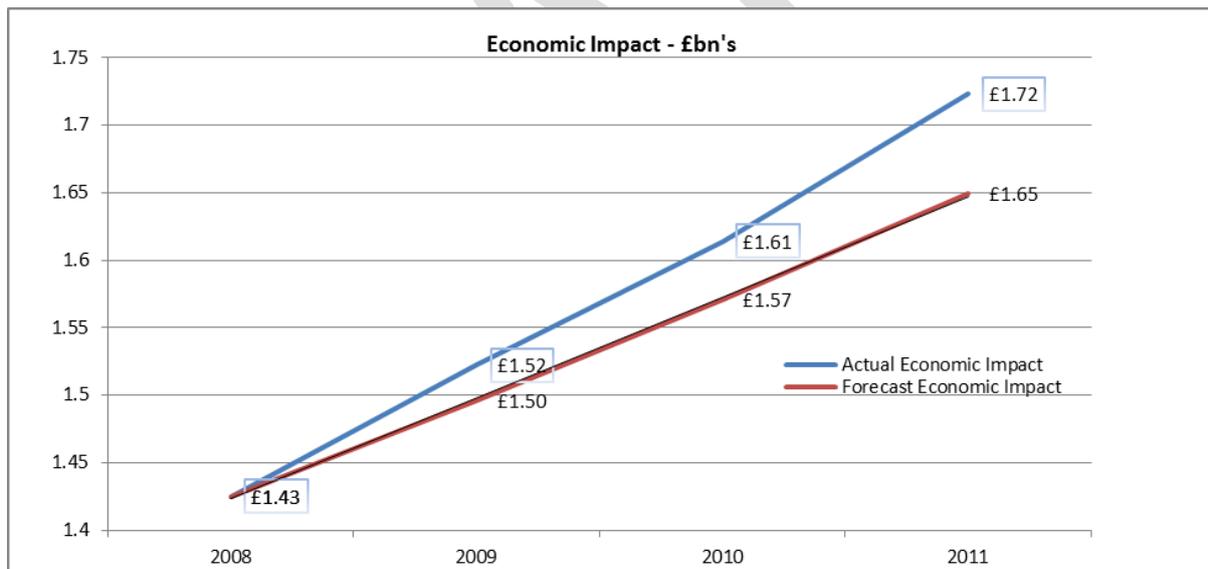
¹ Visit England Annual Progress Report 2013

Tourism in Derbyshire

Significant progress and growth has been made in developing the infrastructure and improving the quality of the product and visitor experience in Derbyshire.

Over a three year period, between 2008 and 2011, visitor spend in Derbyshire has gone up by £300m, from £1.43bn to £1.72bn² per year; an increase of 20%. Over the same period, bed stock across the County has also increased from 36,000 to 42,000³; an increase of 18%. Both provide extremely favourable results against 5% annual targets, even during a period of austerity and economic downturn, demonstrating the sector has actual and real growth potential.

Identified planned investment in the visitor economy during the next 5 years totals circa £850m; these include the redevelopment of The Crescent in Buxton, as a 5* spa hotel; a major new activity resort outside Chesterfield; a new train station at Ilkeston; the first phase of major new development of Cromford Mills; and further investment in the cycling infrastructure in the National Park.



Our Vision

To champion the Peak District and Derbyshire as a great place to visit, live, work and play. 'A world class destination' offering rich experiences in a cherished landscape, having an unrivalled reputation

² STEAM 2011

³ STEAM 2011

for heritage, culture, the outdoors, walking and cycling, with a year round programme of events and festivals.

Strategic Context

The strategic direction of the Derbyshire Visitor Economy closely aligns with Visit England's Strategic Framework for Tourism 2010 – 2020. The ten year Strategic Framework for Tourism in England, published in March 2010, aims to maximise tourism's contribution to the economy, employment and quality of life in England. It sets out the ways in which the industry can work together to realise the framework's growth ambition of 5% year on year in the value of tourism, creating an additional 225,000 jobs and £50billion of expenditure by 2020.

Four independent objectives have been identified to address the opportunities and challenges for England's visitor economy:

- To increase England's share of global visitor markets
- To offer visitors compelling destinations
- To champion a successful, thriving tourism industry
- To facilitate greater engagement between the visitor and the experience

Visit Peak District and Derbyshire is a key strategic delivery partner and has been identified as one of fourteen primary destinations in the Growing Tourism Locally Campaign.

The Strategic Economic Plan for D2N2 sets out a vision to have a more prosperous, better connected, increasingly resilient and competitive economy. It sets out the way in which different sectors can work together to realise the draft plan's ambition to:

- create 55,000 new jobs by 2023.
- achieve a step change in skills levels amongst the workforce and young people
- deliver a significant increase in the number of businesses

The Visitor Economy has been identified as one of six priority sectors which offer the potential for significant economic growth within D2N2.

Our Ambition

Our vision at Visit Peak District and Derbyshire is to grow the visitor economy in Derbyshire by 5% each year up to 2023, bringing substantially increased economic benefits to the area. This challenging but achievable target will bring about £1.2bn additional visitor spend, and create 8,500 new jobs, all of which will be full time equivalents. This will be achieved by promoting our world class destination and maximising the economic investment of visitors by encouraging them to stay longer and do more.

Our Strategic Aims focus on how we can maximise that growth, but also generate wider benefits. A Tourism Impact Study undertaken by Colliers International has helped to further inform the development of these aims, which are:

<p><u>Strategic Aim 1:</u></p> <p>Maximise the impact of the visitor economy in key destinations and hubs</p>	<p><u>Strategic Aim 2:</u></p> <p>Capital investment to improve the visitor offer</p>	<p><u>Strategic Aim 3:</u></p> <p>Create a leading cultural, festivals and events destination</p>	<p><u>Strategic Aim 4:</u></p> <p>Maximise the potential for growth through tactical marketing campaigns</p>	<p><u>Strategic Aim 5:</u></p> <p>Develop a successful thriving tourism industry</p>	<p><u>Strategic Aim 6:</u></p> <p>Develop a consistent brand for the Peak District</p>
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Strategic Aim 1

Maximise the impact of the visitor economy in key destinations and hubs

There are three different types of visitor hubs in the area: Gateway Cities and Towns; Destination Cities, Towns and Villages; and Other Hubs.

‘Gateway Cities and Towns’ are the major urban areas used as a base by visitors, they include cities such as Manchester and Sheffield and towns such as Knutsford and Chesterfield. Market towns need to be supported to maximise their strategic role in the economy; this can be as much about changing the culture of how they operate, for example, opening on Sundays, to the overall offer of the town to make it an attractive place to visit and spend time.

‘Destination towns and villages’ are places that visitors head for to eat, drink, shop, and stay. They include Derby, Bakewell, Buxton and Matlock Bath amongst others and play an important role in the rural economy by offering employment opportunities to local residents.

‘Other hubs’ can include areas that are aligned to a particular heritage, sporting or leisure activity. For example, Hassop and the Monsal Trail area significant cycling hubs and, given the importance of the cycling strategy in the National Park, should be encouraged to act as general visitor hubs as well.

Overarching this, we must provide visitors with succinct information that is easy to find from when they arrive through different contact points across the destination. Offering improved connectivity between gateways, destinations and hubs will allow visitors to travel around the area and get from A to B as simply as possible.

Objectives:

- To strengthen, or establish where necessary, transport connectivity between gateway towns and neighbouring cities.

- To improve connectivity between public transport services, accommodation, visitor attractions, and cycle routes in and around hub & gateway settlements
- To improve signage, interpretation and information services in hub and gateway settlements to maximize visitor dispersal, activity and spend. Partners must work together in creating a real sense of place.
- Improve the visitor experience by meeting their expectations, this includes, cleanliness, safety and security
- Support Destination strategies to unlock additional funding opportunities to encourage local SMEs investment within key destinations and hubs to improve the visitor experience.

Strategic Aim 2

Capital investment to improve the visitor offer.

Visitor attractions and quality of accommodation are very important elements of the visitor offer. Across Derbyshire there is a huge range of attractions to meet the needs of all consumers. Whilst the County has a USP in its stately homes, it also offers a good mix of other attractions including heritage railways, wildlife parks, visitor centres, galleries and small museums. Derbyshire also boasts walking and cycling routes, theme parks, parks, gardens, museums, and art centres.

An independent Tourism Impact Study undertaken by Colliers International identified a significant number of planned and potential investment opportunities across the County covering a range of themes including attractions; accommodation; access; activities and sports etc. In most cases, it is existing attractions and sites which could play a more significant part in the visitor offer of the area, and there are real opportunities to capitalise on the benefits of such capital infrastructure investment including increased employment, visitor spend and new visitors.

Objectives:

- Identify where added value can be achieved through the commissioning of feasibility studies e.g. understanding consumer behaviour and expectations
- Prioritise capital spend based on evidence through feasibility studies/stakeholder consultation that offers the greatest return on investment.
- Enable this area of activity to attract new visitor segments to the area, providing real growth opportunities

Strategic Aim 3

To create a leading cultural, festivals and events destination

There are a large number of cultural and events and festivals which take place across the county throughout the year. Some of these, such as the major events at Chatsworth and the Buxton Festival, act as attractors bringing increased numbers of staying visitors to the area. The majority however provide colour and animation to destinations and enhance the experience of visitors. They

often act as a hook for repeat visits and encourage visitors to explore lesser known areas of the destination.

All cultural venues are under threat from potential reduction or withdrawal of revenue funding. In Derby in particular, the cultural venues are seen as an important part of the destination experience and it is vital that a sustainable strategy is developed for those venues under threat. We need to explore ways of generating more from what we already have, rather than investing capital money in new venues.

Objectives:

- Support the development and delivery of major cultural events by working to improve the quality of our offer and lever external resources
- Focus on attracting cultural events and festivals that resonate with the brand values of the Peak District and Derbyshire, for example, Eroica, The Grand Tour and Tour De France 2014.
- To improve co-ordination and branding of cultural festivals and events to ensure destinations achieve maximum value from their events programmes. An informed strategic calendar of cultural events and festivals will benefit the County by reducing duplication, streamlining marketing and gaining efficiency savings.
- Improve the quality and competitiveness of existing venues within Derby, ensuring that they become self-sustaining
- To support signature cultural events and festivals providing local colour, and a sense of place.
- To ensure cultural events and festivals return year after year, and not move to other destinations

Strategic Aim 4

Maximising the potential for growth through tactical marketing campaigns

The Peak District and Derbyshire attracts 4m staying visitors and 35m day visitors each year, spending £1.7bn per year. It is of equal importance to look after our current visitor numbers as it is to explore and open up opportunities to attract new visitors. To achieve this we must ensure that we get the basics right. We must continue to market and champion our most distinctive assets, as well as our independent retailers and restaurants. We must create a stronger sense of place, improve on our customer service, and the quality and warmth of our welcome must be accepted as a basic essential.

Visitor information provision has changed significantly in recent years as some local authorities have been forced to close Tourist Information Centres and visitors increasingly use online and mobile sources of data. More and more businesses are moving towards digital advertising only through web applications. We need to keep ahead of our game and invest in new ways of communicating with visitors through tactical marketing campaigns that will attract, in particular, new types of visitors to the area.

The current financial model of the Destination Management Organisation is under threat; Local Authority partners are facing unprecedented cuts which has led to reduced contributions to support the core costs of DMO. To counteract this, we must prioritise our efforts by focusing on the target markets where we can realise the growth in value. Domestic visitors remain a priority and we will continue to focus on shifting the demographics of visitors and the nature and length of their visit.

We will continue to deliver multi-channel promotional campaigns that drive key messages to target audiences. We will maximise the impact of all activity by working in partnership and seeking match funding, in particular from the private sector.

We will track the impact of promotional activities undertaken, in order to ensure they each deliver maximum return on investment for both Derbyshire and the partners involved. We must also continue to invest in perception surveys to understand if, and how, we are shifting perceptions across our priority markets.

There is real opportunity to develop the short break offer and work with neighbouring cities such as Manchester and Sheffield who have a high population of young professionals looking for last minute short breaks. We will also build relationships with Manchester who provide scope for growth in the visitor economy, boasting inbound visitor numbers of 20m passengers a year, and aspirations to grow capacity to handle 24million passengers by 2018,

Objectives:

- Develop a new financial model to support the long term sustainability of the DMO
- Create tactical marketing campaigns designed to extend the holiday season, reach new markets where there is capacity for growth, and support the area's aspiration to become a world class cycling destination
- Develop the area as a destination to take a short break, building on the range of attractions and events available, and inspire visitors to re-visit
- Invest in the Visit Peak District and Derbyshire website to ensure the needs of the industry, as well as those of potential visitors, are fully met
- Deliver a Visitor Dispersal Plan which includes:
 - Dispersal publications and distribution
 - The Peak Explorer mobile phone app
 - Visitor information points to compliment TIC's and Visitor Centre networks
 - In destination promotional events
 - Marketing campaigns in direct response to sector needs for example, events and festival promotion
- Work with partners to reduce duplication and cost across all aspects of destination marketing

Strategic Aim 5

To develop a successful thriving tourism industry

Visitor economy businesses within the Peak District and Derbyshire employ over 27,000 people. The skills of our workforce are paramount in order to improve the visitor welcome, raise productivity and improve the visitor experience and we must continue to invest and develop in this area.

One in twelve jobs in the UK is either directly or indirectly supported by tourism. 44% of people employed in tourism are under 30 compared with an average for the wider economy of 24%⁴. There is an important role to play in promoting the sector as a place to be proud to work within, with opportunities to develop rewarding careers. It is a flexible and versatile sector and offers a range of entry level opportunities for school leavers, people without formal qualifications, those re-entering the workforce and for part time or temporary employees. Current skills shortages in areas such as chefs, customer care staff and hospitality management can be addressed through opportunities such as apprenticeships that enable local people to benefit from quality training and skills development that will lead to a career with stability and long term prospects.

We aim to provide the platform for SMEs in the area's visitor economy to become more innovative, meet the expectations of the visitor, survive and grow, and create more job opportunities for local people. This ambition can be realised through a programme of sector specific support including small infrastructure/ improvement grants, specialist training events, workshops, and individual support for tourism businesses, retailers, food & drink outlets

Objectives:

- Up-skill SMEs in the use of ICT, in particular on-line trading, social media, customer review systems, etc .
- Getting the most out of websites and online bookability, with the aim of improving occupancy levels
- Training events to improve customer service, financial management, food management etc. all geared to increase bottom line results
- Increased take-up of EQM and other green schemes
- Introduction of a Peak District and Derbyshire visitor economy apprenticeship scheme
- Link with Visit England to increase buy-in from indigenous businesses to offer local training opportunities

Strategic Aim 6

A consistent brand for the Peak District

The most significant weakness identified in the first phase of the Tourism Impact Assessment undertaken by Colliers International was the inconsistency in the way in which the destination is branded.

We want to establish a single, over-arching destination brand for the Peak District which encapsulates the magnificence of the National Park. A strong Peak District destination brand will

⁴ ONS 2012

help overcome confusion between the Peak District National Park and the wider Peak District, which includes towns and villages such as Matlock, Ashbourne, Glossop and Leek. It will also create a strong attraction for potential visitors and improve the perception of places that are nearby to the boundaries of the Peak District, for example Chesterfield, Macclesfield and Cheadle. The long-term impact of a strong brand will be a desire from both businesses and people to locate in the Peak District.

Objectives:

- Work with and secure senior level commitment to an over-arching Peak District destination brand and acceptance of branding/logo guidelines across all local authority partners.
- Develop local destination straplines, for example, Derby – city of the Peak District, and Chesterfield- Gateway town to the Peak District to achieve a whole which is greater than the sum of individual parts
- Explore opportunities to clearly promote the Peak district as a destination on road signs on the busy stretch of the M1
- Champion the brand with all local businesses to support the brand on their products

Objectives and targets

Objective	2008 baseline	2011 baseline position (latest data)	Target for 2023
To increase staying visitor numbers from 3.9m to 7m	3.6m	3.9m	7m
To increase the number of day visitors from 35m to 62.8m	31.6m	35m	38m
To increase the value of tourism from £1.72bn to £3.08bn	£1.42m	£1.72bn	£3.08bn
To increase the number of jobs supported by tourism from 27,000 to 35,500	24,000	27,000	35,500

Notes to support outputs:

The amount of jobs created using STEAM data since 2006 (as a guide) indicates growth of 2.3% year on year and aligns with the ambitions and expectations of D2N2 for 55,000 new jobs created by 2023.