The Northumberland Area Tourism Management Plan 2009-2012

(Version 2 – 2006 reformatted & updated November 2008)

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Preface

The Visitor Economy is one of Northumberland's most important economic sectors. An independent assessment[1] has concluded that, in 2007, approximately **12,700 jobs** (full time equivalents) were supported by direct tourist expenditure in the county, and a further 2,900 jobs were supported by indirect revenue from tourism.

1.9 million overnight tourists visited Northumberland in 2007, spending 7.7 million nights in the area. In addition 8 million day visits were made in the area. Overnight visitors spent £296 million in the County with day visitors spending a further £154 million. When indirect revenue of £260 million is taken into account, the **total contribution of tourism to the Northumberland economy in 2007 was £710 million.**

However there is still scope for more growth.

In spite of recent improvements one of the biggest problems is that the Northumberland visitor economy remains **highly seasonal**, with the summer period (July to September) accounting for over a third of all tourist days. This leads to low status for many jobs, a lack of good training opportunities for many staff in the industry, difficult cash flow problems for business and an inability to attract significant inward investment, compared to elsewhere in the region. A further major problem identified by visitor surveys is that many visitors are relatively disappointed with our food and retail offer, compared to other similar areas of the country.

There is a common view that Northumberland has **all the right natural assets to become an even more successful visitor destination**, but has yet to take full advantage of them.

This document is the Northumberland Area Tourism Management Plan (or ATMaP) for 2009-2012. It sets out the aims and strategic priorities for the development and promotion of tourism in the county to address these issues and build on our strengths, in the context of the North East Tourism Strategy. While the ATMaP is ultimately the responsibility of the Northumberland Tourism Board, the ATMaP provides the framework for actions to be undertaken by a wide range of agencies and organisations. It also provides a rationale for future public sector investment in the sector.

Whilst the ATMaP is not directly concerned with public sector funding, no 'Single Programme' funding will be allocated towards any project relating to the visitor economy that is not identified as a priority in the ATMaP, or which cannot demonstrate clear delivery towards at least one of the Programme Activity areas.

The ATMaP will always be a working document and will be amended on a rolling basis throughout the year. In particular, it should be noted that objectives and targets will be amended on receipt of more up to date research; and project implementation and partnership arrangements will alter to reflect ongoing dialogue with stakeholders. The ATMaP is a short to medium term action plan with the first 3 years shown in some detail, though some projects need to be set in the context of a longer term strategic framework.

[1] The STEAM report – see Appendix A

A companion document, the Northumberland Tourism Business Plan, sets out the detailed actions to be undertaken by Northumberland Tourism, the Area Tourism Partnership (ATP) for Northumberland. Northumberland Tourism has been created to deliver key actions that will help meet many of the objectives contained in this ATMaP. However, it is important to recognise that this ATMaP is relevant to all public and private sector organisations involved in the visitor economy, not just the ATP.

Businesses and Local Authorities are united in their belief that developing the visitor economy is one of Northumberland's best possible opportunities for future economic growth and job creation. They are equally united in their belief that Northumberland has a unique visitor offer that provides an ideal platform for success. The purpose of this ATMaP is to set out how this success can be achieved through improved partnership working and a step change in public sector support.

Signed

Peter Kemp
Chair
Northumberland Tourism

November 2008

Acronyms used in this document

AONB	Area of Outstanding Natural Beauty
ATMaP	Area Tourism Management Plan
ATP	Area Tourism Partnership (such as Northumberland Tourism)
CoVE	Centre of Vocational Excellence
ENC	England's North Country
LA	Local Authority
LAA	Local Area Agreement
MiN	Made in Northumberland project
MTW	Market Town Welcome project
NE	North East (England)
NETSA	North East Tourism Skills Alliance
NNPA	Northumberland National Park Authority
NSP	Northumberland Strategic Partnership
ONE	One NorthEast (regional development agency)
RDPE	Rural Development Programme for England
RES	North East Regional Economic Strategy (2002-2005)
RTS	North East Regional Tourism Strategy (2005-2010)
TIC	Tourist Information Centre

1. Northumberland Tourism Priorities and Projects

1.1 Priorities for Northumberland

This core section of the report sets out the tourism activities and actions that Northumberland tourism stakeholders agree are required for the county to make its maximum contribution to the areas for action identified in the NE Tourism Strategy.

The Tourism Vision for the North East as outlined in the strategy is that:

> *The North East of England will become a sought after destination 365 days a year – for leisure and business visitors – with activities, attractions, facilities and accommodation that consistently exceed visitor expectations.*

While the tourism vision for Northumberland states:

> *The vision of Northumberland is to establish the county as a premier rural destination in the UK, balancing the needs and expectations of the international and UK visitor, businesses and communities whilst protecting and further developing the County's exceptional environment and rich cultural heritage.*

By seeking to meet these two vision statements, Northumberland believes that it will achieve the following long term strategic aims:

- Increase jobs within the visitor economy
- Improve job quality and better job security in the industry
- Create a more entrepreneurial culture in the county by supporting the opening of new sustainable tourism businesses
- Help safeguard valued local community services, from village shops and rural public houses to town centre museums and leisure facilities
- Develop and spread the benefits of the visitor economy to all parts of Northumberland, including the south east of the county
- Help create a higher profile for both Northumberland and the NE region which will:
  - have benefits to many other sectors of the economy, including the food, crafts and cultural industries, and local supply chains
  - assist in the attraction of inward investment to the region
- Improve business practices and create a better trained and skilled workforce as a result of the greater stability and security in the tourism industry
- Increase capital investment in tourism businesses to the benefit of the wider economy, including building services.

In order to realise these strategic aims, Northumberland Tourism partnership has adopted 10 objectives which also reflect the Regional Tourism Strategy:
1 – Attract more domestic and international visitors
2 – Increase tourists' average spend
3 – Increase visits throughout the year, not solely in the main holiday season
4 – Increase employment in the visitor economy
5 – Improve the productivity of the tourism economy
6 – Accelerate the rate of investment in the tourism product & other business sectors
7 – Improve the quality of the tourism product
8 – Improve the quality of the tourism workforce
9 – Improve levels of visitor satisfaction
10 – Enhance and conserve Northumberland's natural, heritage and cultural assets.

These strategic aims will be achieved through three overlapping – not mutually exclusive – approaches:

- Actions delivering to **Programme Activities**, as outlined in Section 1.1.1 and the table in Section 1.2 (and detailed in Appendix B)
- Activity to realise plans for the key **Destination Management Areas** (Section 1.1.2)
- Delivery of the prioritised **Capital Projects** in (Section 1.1.3 and Appendix H).

1.1.1 Programme Activities

The table in Section 1.2 presents an action plan for the activities that will be taken to improve the marketing and branding of the sub-region, the information available to visitors before, during and after their visit, and the whole visitor experience whilst they are in the area.

The programmes broadly cover two approaches to activity: those required to strengthen and co-ordinate the partnership; and those required to build the success of the tourism sector. The first section covers activities concerned with planning and supporting collaboration and will largely be the responsibility of Northumberland Tourism. One or more members of the partnership should deliver all of the actions listed in the second section.

Collectively, these are the measures which will be taken to help businesses grow and become more profitable. The actions cover a timescale of 3 years (though some may run beyond this timeframe) and are categorised into these broad areas of activity:

A Strategic direction: a clear vision for the Northumberland visitor economy, consistent with local, regional & national plans
B Stakeholder relationships: strong and effective relationships among all visitor economy stakeholders
C Representation and communication: a strong and coherent voice for the interests of tourism operators in the sub-region
D Research, intelligence and performance evaluation: providing appropriate research & market intelligence and evaluation of the Northumberland visitor economy and of ATP partner activity
E Marketing: the generation of tourism business through targeted and effective promotional activity
F Visitor services and information management: the provision of services and destination information for consumers and intermediaries; and an infrastructure to support customer relationship management
G Activities: continuing improvement and investment in the product to meet changing expectation of the market:
H Attractions: (as above)
I Experiences: (as above)
J Accommodation: support for the delivery of appropriate accommodation provision to meet rising expectations in the market, achieve higher standards, occupancy levels and profitability
K Business and workforce development: ensuring that tourism businesses are able to operate effectively and efficiently and develop in ways that continually improve standards
L Integrated transport infrastructure: achieving the most effective provision and integration of transport to supports the tourism offer
M Planning and the environment: building on the existing planning system to create additional tourism investment and public realm proposals that are sustainable both financially and environmentally, and meet the needs of visitors, the industry and local communities.

1.1.2 Destination Management Areas

Local conditions and market opportunities have created the potential for some areas to act as major catalysts for growing the visitor economy. These areas will help to deliver towards several of the Programme Areas identified in Section 1.1.1 and may also translate into Capital Projects outlined in Section 1.1.3.

In October 2008, the Destination Management Areas for Northumberland are:

- Towns in the Market Town Welcome Programme (Berwick, Wooler, Seahouses, Alnwick, Amble, Morpeth, Haltwhistle & Hexham)
- Hadrian's Wall corridor
- Kielder Water and Forest Park
- Northumberland National Park
- The Northumberland Coast and North Pennines Areas of Outstanding Natural Beauty

(Druridge Bay is also developing with potential to emerge as a future priority)

Each have, or are developing, their own specific destination plans, which themselves should be regarded as 'external appendices' to this ATMaP.

In addition, the three community-steered Leader areas in Northumberland – Uplands, Coast & Lowlands, and North Pennines – have tourism sections within them which provide a locally based approach to tourism development in landscape-scale areas of Northumberland.

1.1.3 Capital Projects

Projects which directly deliver towards ATMaP objectives are regarded as priorities for inclusion in the ATMaP.

A mixture of quantitative and qualitative approaches is used by Northumberland Tourism in partnership with the Northumberland Strategic Partnership to identify which projects should be put forward as priorities – for example, based on evidence of delivery towards ATMaP objectives and their target priorities. Further details on project assessment can be found in Section 2.3.

The Table of Priority Projects in Appendix H will be constantly changing as projects emerge and are assessed, funding becomes available or restricted, etc. The Northumberland Strategic Partnership (NSP) holds the most up to date list of capital (public sector) investment priorities for tourism on behalf of Northumberland Tourism, however in October 2008 the priority capital projects were:

- Alnwick Garden (completion of cherry orchard)
- Hadrian's Wall Central programme projects (Vindolanda, Housesteads & Sill)
- Kielder Water and Forest Park 'Big Picture'
- Seaton Delaval Hall acquisition
- Hexham Abbey Christian Heritage visitor facilities
- Market Town Welcome capital programme
- Northumberlandia at Blagdon

1.2 The Area Tourism Management Plan: Table of Programme Activities 2009-2012

In the following table, actions have been prioritised according to the extent of their contribution to ATMaP objectives. These are marked 'Gold' for high priority, 'Silver' for medium priority, and 'Bronze' for lesser priority. The final column describes if the activity is new or the extent to which the activity is currently delivered (either major or minor). Further detail on these can be found in Appendix B.

2009-2012	Priority	Timescale	Related Objectives	Indicative Cost	Lead	Support
A. Strategic Direction: a clear vision for the Northumberland visitor economy, consistent with local, regional & national plans						
Coordinate production of the Tourism Management Plan	(P1)[2]	2009	Corporate – unrelated to any single objective	Core responsibility of ATP	ATP	
Regularly review & identify strategic objectives for tourism for Northumberland	(P2)	2009	Corporate – unrelated to any single objective	Core responsibility of ATP	ATP	
Ensure Northumberland influences regional tourism strategies and priorities through Regional Network	(P3)	2006-2009	Corporate – unrelated to any single objective	Core responsibility of ATP	ATP	
B. Stakeholder relationships: strong and effective relationships among all visitor economy stakeholders						
Support and develop private sector tourism associations and networks in the aims of the ATMaP	(P4)	Ongoing	Unrelated to any single objective	Core responsibility of ATP	ATP / Tourism Associations	
Consult with stakeholders and businesses to agree priorities and actions on an ongoing basis	(P5)	Ongoing (2006-2009)	Corporate – unrelated to any single objective	Core responsibility of ATP	ATP / Partners	
Operate a Tourism Business Registration Scheme for Northumberland businesses to join the Regional network	(P6)	Ongoing (2006-2009)	Corporate – unrelated to any single objective	Core responsibility of ATP	ATP / Private	
Establish and/or facilitate working groups to engage stakeholders and utilise experience and knowledge	(P7)	Ongoing (2006-2009)	Corporate – unrelated to any single objective	Core responsibility of Partners	ATP / Partners	

[2] NB. The number in brackets (e.g.P1) relates to Project Reference used in Appendix B of the full ATMaP. P = Partnership, G = Gold, S = Silver, B = Bronze.

2009-2012	Priority	Timescale	Related Objectives	Indicative Cost	Lead	Support
C. Representation and communication: a strong and coherent voice for the interests of tourism operators in the sub-region						
Represent interests of Northumberland's tourism businesses and stakeholders within the Regional Tourism Network	(P8)	Ongoing (2006-2009)	Corporate – unrelated to any single objective	Core responsibility of ATP and associates	ATP / Associates	
D. Research, intelligence and performance evaluation: providing appropriate research & market intelligence and evaluation of the Northumberland visitor economy and of partner activity						
Support One NorthEast with relevant data	(P9)	Ongoing (2006-2009)	Central to defining target on most objectives	Ref ATP Business Plan	ONE / ATP	
Undertake a medium term projection of national and international visitor trends to the county	(P10)	When resources allow	Corporate – unrelated to any single objective	Met as integral part of operational activity	ONE / ATP	
Coordinate collection of key data in N'land to meet the needs of the Regional Network and Visit Britain and to enable evaluation of the ATP's performance	(P11)	When resources allow	Corporate – unrelated to any single objective	Met as integral part of operational activity	ATP / Private sector	
Research residents' understanding of the value of tourism	(P12)	When resources allow	Corporate – unrelated to any single objective	Met as integral part of operational activity	ATP	
E. Marketing: the generation of tourism business through targeted and effective promotional activity						
Undertake destination marketing for Northumberland	Gold (G1)	2006-2009	Objectives 1,2, and 3	Ref ATP Business Plan	ATP / Private sector	
Undertake specific marketing and media campaigns (including web-based and e-mail campaigns) to promote low season visits from October – Easter	Gold (G2)	2006-2009	Primarily Objective 1 in addition Objective 1	Included in the ATP Marketing budget	ATP / ONE / Private sector	
Market Northumberland as a major holiday destination within England's North Country to key international markets	Gold (G3)	2006-2009	Objective 1		ONE / ENC / Private Sector	ATP
Ensure cross boundary working with Cumbria, Co Durham, Tyne & Wear, and Scottish Borders	Silver (S1)	Ongoing	Corporate – unrelated to any single objective	Met as integral part of operational activity	ATP (with T&W, Cumbria, Durham, Borders)	

2009-2012	Priority	Timescale	Related Objectives	Indicative Cost	Lead	Support
Market Northumberland to group travel operators including conference organisers, coach tours, educational visits, cruise tourism and major carriers (ferries and airlines)	Bronze (B1)				ONE / ATP / Group Venues & Hotels	
F. Visitor services and information management: the provision of services and destination information for consumers and intermediaries; and an infrastructure to support customer relationship management						
Support the regional e-business platform; use it to supply information to TICs, websites and kiosks; and promote participation by tourism businesses	Gold (G4)	Ongoing (2006-2009)	Objective 1 and via roll-out to businesses Objective 8	Costs met by ONE & ATP	ONE / TIC owners / Private Sector	ATP
Play a full part in the North East Visitor Information Network to improve the profile, branding and operation of Northumberland's Tourist Information Centres	Silver (S2)	Ongoing (2006-2009)	Objective 9	Included in ATP & LA Marketing budget	ONE / ATP/ LA / NNPA	
Encourage the adoption of the Northumberland brand for use in local information to provide consistency	Silver (S3)	Ongoing	Corporate – unrelated to any single objective	Met as integral part of operational activity	ATP	ONE / ATP / LA / Private sector / Tourism Assoc.
Improve the training provision for TIC staff	Bronze (B2)			LA Tourism budget	ONE / ATP / TIC owners	
Publish and distribute a comprehensive range of detailed local information for tourists and day visitors including events calendars	Bronze (B3)			ATP & partners marketing budgets	LA / Tourism Assoc. / Events Organisers / ATP partners	
Activities, Attractions and Experiences: continuing improvement and investment in the product to meet changing expectation of the market						
G. Activities						
Provide, maintain and market a network of countryside access routes for walkers and cyclists	Gold (G5)	2006-2009	Primarily Objective 7 and in addition Objective 9		ATP / LA / North Pennines AONB / Hadrian's Wall Heritage	

2009-2012	Priority	Timescale	Related Objectives	Indicative Cost	Lead	Support
Develop access to outdoor activities and nature-based tourism, including through the involvement of community-based provision	Silver (S4)		Objectives 1, 2, 3 and 9		ATP / Business & Community Partners	
Improve the take-up of the national 'Walkers and Cyclists Welcome' scheme for tourism	Bronze (B4)			ATP / Private sector		
H. Attractions						
Develop Northumberland's magnet attractions	Gold (G6)	2006-2009	Primarily Objective 3 & 4, in addition Objectives 9, 1, 2 & 6	ATP core responsibility	Hadrian's Wall Heritage, LA, attraction operators	
Improve quality at existing tourist attractions including through participation in national quality schemes and extended winter opening	Gold (G7)	Ongoing (2006-2009)	Objectives 3, 7, 4 & 9	Included in core ATP budget	ATP / Attraction Operators	
Support the creation of new, sustainable attractions that will help to fill a recognised product gap for the county	Gold (G8)	Ongoing (2006-2009)	Objectives1, 2 & 4	Included in core ATP budget	ATP / Attraction Operators	
Ensure the cross promotion of attractions, especially from magnet attractions	Bronze (B5)			ATP Marketing budget	ATP / ONE / Attraction operators	
Organise familiarisation visits to attractions for businesses, TIC & ATP staff	Bronze (B6)			ATP Marketing budget	ATP / Attraction Association / Private Sector / Attraction operators	
I. Experiences						
Encourage and assist tourism businesses to improve the food offer including by making more use of local food and drink	Gold (G9)	2007-2012	Objectives 9, 6 & 8	ATP's Made in Northumberland & Market Town Welcome projects budgets, RDPE	ATP / ONE / Private sector	
Support the development and promotion of	Gold (10)	Ongoing	Primarily	Included in marketing	ATP / Event	

2009-2012	Priority	Timescale	Related Objectives	Indicative Cost	Lead	Support
Northumberland festivals and events			Objective 3, & in addition Objectives 9 & 1	budget	organisers / ONE	
Encourage an improved retail offer for visitors including 7-Day opening, more local gifts and better markets	Gold (G11)		Objectives 9, 6 & 8	MiN & MTW projects budgets	ATP / Market Town	
Improve tourist facilities and customer care for people with special needs, including through training.	Bronze (B7)				ATP / Private sector / Business link	
J. Accommodation: support for the delivery of appropriate accommodation provision to meet rising expectations in the market, achieve higher standards, occupancy levels and profitability						
Encourage more businesses to participate in national quality inspection schemes, only allow inspected properties in tourism marketing campaigns and support quality improvements	Silver (S5)	Ongoing	Primarily Objectives 7, and in addition Objective 9	ATP core and Marketing budgets	ATP / Accommodation Businesses / Accommodation Associations	
Compile and maintain a sites and premises register for new tourist accommodation opportunities	Bronze (B8)				ATP	
K. Business and Workforce Development: ensuring that tourism businesses are able to operate effectively and efficiently and develop in ways that continually improve standards						
Provide appropriate business training and support for tourism operators and businesses as part of the regional and Northumberland Tourism Workforce Development Plan	Silver (S6)	Ongoing	Primarily Objective 8, & in addition Objectives 4 & 9	Core responsibility of ATP	ATP / Training providers / Business Link / Businesses / ONE	
Improve businesses take up of the 'green' tourism agenda including through a Green Business Accreditation Scheme	Silver (S7)	Ongoing	Sustainable tourism at hear of Northumberland's agenda. No specific objective	Core responsibility of ATP	ONE / ATP / NNPA / Private Sector / North Pennines AONB	

2009-2012	Priority	Timescale	Related Objectives	Indicative Cost	Lead	Support
Provide and attend specialist Customer Care training for tourism businesses such as 'Welcome Host'	Bronze (B9)			Core responsibility of ATP	ONE / CoVE / Private sector	
Identify major skills gaps in the industry and contribute to the collection and analysis of other relevant workforce data	Bronze (B10)				NETSA / ONE / ATP / CoVE	
Improve the links that businesses have with the regional tourism network through Tourist Information Centres	Bronze (B11)			LA Tourism budget & ATP Marketing and core budgets	LA / Private Sector / ATP	
L. Integrated Transport Infrastructure: achieving the most effective provision and integration of transport to supports the tourism offer						
Work with public transport providers to improve the links to tourist attractions and the countryside	Silver (S8)	Ongoing 2006-2009	Objective 9	LA & ATP Core responsibility with no additional budget implications	LA	
M. Planning and the Environment: building on the existing planning system to create additional tourism investment and public realm proposals that are sustainable both financially and environmentally, and meet the needs of visitors, the industry and local communities						
Develop Northumberland's protected landscape areas (National Park, Coast AONB, North Pennines AONB, Hadrian's Wall) as important visitor destinations through appropriate sustainable tourism projects, as identified in their own Area Management Plans	Silver (S9)	Ongoing	Corporate – unrelated to any single objective	Core responsibility of partners with no additional resource requirements	NNPA, AONBs & Hadrian's Wall Heritage	

2. The Process and the Partnership

2.1 The Northumberland Area Tourism Partnership and its Priorities

There is clear agreement that the visitor economy in Northumberland has major opportunities that could be exploited to help it achieve its true potential, plus significant weaknesses that need to be addressed.

The public-private sector Area Tourism Partnership (ATP), Northumberland Tourism, was created in 2006 to play a major role in tackling these issues, including:

- Reducing the duplication of activities amongst existing agencies, resulting in a more cost effective use of existing public and private sector resources
- Through a united and consistent effort from public and private sector, ensuring that Northumberland has a higher profile amongst potential visitors, helping to grow a bigger visitor economy for all to share
- Ensuring a consistent and integrated delivery of information to visitors through the visitor information network, promoting the attractions of the whole of Northumberland
- A public-private sector partnership being able to draw upon significantly more resources from One NorthEast, the Northumberland Strategic Partnership and other agencies than would ever be possible for a single Local Authority or Tourism Association acting in isolation
- Developing a united Northumberland tourism sector, to be able to influence the regional and national tourism agenda much more effectively than it had been able to do in the past
- Involving the private sector in the decision-making process and in the allocation of resources which will likely result in more cost effective activities that are better supported by businesses. This should help to yield higher CPA ratings from the Audit Commission for Local Authorities, because of the clear demonstration of local involvement and support in spending decisions
- The ATP clearly demonstrating to government and to local people of effective joint working between the public sector agencies.

It is important to acknowledge the intention that the Local Authorities and public agencies see the work of Northumberland Tourism as an opportunity to make a real difference by pooling resources, and not an opportunity to cut back on their existing support for the industry.

Northumberland Tourism is a not for profit company limited by guarantee. It is managed by a Board of Directors comprised of members with significant experience from the public and private sectors, recruited to support delivery towards the company's objectives

Whilst the Northumberland Area Tourism Management Plan (ATMaP) is a strategic document for all organisations involved in the development and promotion of tourism in Northumberland, the Board of Northumberland Tourism has key responsibilities with respect to:

- Ensuring that all partners are aware of their responsibilities with respect to the delivery of actions identified in the ATMaP and incorporating these actions in relevant Service Level Agreements with partners
- Monitoring progress towards achieving the objectives and targets set out in the ATMaP

- Presenting an annual report to partners and stakeholders with respect to the delivery of the ATMaP, including the actions undertaken by Northumberland Tourism
- Preparing and agreeing the next Northumberland ATMaP.

This 2009-2012 ATMaP is a reformatted version of the 2006-2009 plan, with some amendments to update details such as incorporating more recent research findings, and reflecting developing and emerging programmes and projects. Many stakeholder and partner organisations participated in the preparation of the 2006-2009 ATMaP in order to maximise the use of their experience and knowledge, and secure their buy in. An illustration of the range of partners who will be involved in the delivery of the ATMaP is in Appendix C.

The Northumberland ATMaP is not a stand-alone document. It is closely linked with the objectives and actions identified in the Regional Tourism Strategy and with the Plans of the three other sub-regions of North East England (Tyne & Wear, County Durham and Tees Valley). Collectively, the documents will ensure that a consistent and complimentary approach is taken to the development of the tourism sector across the region, whilst allowing sub-regions to decide on their own specific priorities.

Similarly, Northumberland Tourism and its partnership will not operate in isolation. It is part of a formal network that includes the Regional Tourism Team and the three other ATPs. This is a true partnership arrangement which is at least as much about the ATPs influencing the work of the Regional Team, as it is about the Regional Team guiding and co-ordinating the work of the ATPs.

Finally, Northumberland Tourism will have a symbiotic relationship with Hadrian's Wall Heritage, the body overseeing the work on Hadrian’s Wall in North East and North West England.

2.2 The ATMaP Process

Work began on the preparation of the first ATMaP (2006-2009) following the inaugural meeting of the Northumberland ATP Task Force on 21 February 2005. The Task Force had around 30 members; approximately 50% from the public sector and 50% from the private sector (see Appendix D). An Area Tourism Management Plan Working Group was formed by the Task Force and met to discuss key aspects of the ATMaP at regular meetings from May to August 2005. The conclusions reached at these meetings were the basis for the majority of this document, within the context of existing strategic documents.

The four major documents which formed the background to the preparation of the Northumberland Area Tourism Management Plan (2006-2009) were:
- Blue Skies, the Northumberland Tourism Implementation Plan 2003-2005, published by the Northumberland Strategic Partnership in June 2003
- The North East Tourism Strategy, 2004-2007, published by One NorthEast in January 2005
- ATMP Template and Guidance Notes, published by One NorthEast in February 2005
- Green Roots – A Working Paper to Explore Sustainable Tourism Principles for a Northumberland ATP, published by Northumberland County Council in February 2005

The preparation of the original ATMaP (2006-2009) was co-ordinated by the Northumberland Strategic Partnership (NSP), working to guidelines issued by One NorthEast with technical support from the TEAM Consultancy Group. Following an open consultation period in autumn 2005, the final draft of the ATMaP was produced in March 2006 before being handed over to Northumberland Tourism.

Since Northumberland Tourism was incorporated in April 2006, the ATMaP has been discussed, amended and adopted as the company's guiding policy document. This current version of the ATMaP (2009-2012) has a restructured format, as undertaken by all the ATPs in the North East to help align each sub-regional ATMaP. However, some updating has been included, for example based on: latest research such as the STEAM 2007 figures (see Appendix A); programme and project evolution within the partnership; advice from One NorthEast's Regional Tourism Team, including the ATMaP Template Overview guidance notes (May 2008); the emerging regional Marketing Framework, and; local government reorganisation in Northumberland.

This ATMaP (2009-2012) was formally approved by the Northumberland Tourism Board in November 2008. A more thorough refresh of the ATMaP's *content* (as opposed to primarily the structure), is planned for 2009, in association with the wider Northumberland tourism partnership.

2.3 Activity and Project Assessment Criteria

A mixture of quantitative and qualitative approaches is used by Northumberland Tourism to identify which programmes and projects should be taken forward as priorities – for example, based on evidence of delivery towards the ATMaP objectives, plus the experience and knowledge within the partnership.

In Northumberland, the Northumberland Strategic Partnership (NSP) acts as an agent for the Regional Development Agency, One NorthEast (ONE) in delivering the Regional Economic Strategy (RES) at a county level. This involves developing a coherent and prioritised Single Investment Programme for Northumberland. It articulates a clear business case for a package of regeneration initiatives designed to maximise the county's contribution to the region's economic productivity and participation.

NSP, through its core team and Culture Sector Board, has been involved in lengthy and detailed negotiations with One NorthEast to gain support for a number of Northumberland tourism initiatives within a suite of regional thematic programmes. NSP are responsible for bringing forward a pipeline of tourism regeneration projects that will improve the economic prosperity of Northumberland and then support the sponsors of these initiatives in securing funding from One NorthEast. Northumberland Tourism continues to work closely with NSP within this process to ensure continuity of quality partnership working, including identifying priority capital projects for development.

All projects coming forward are subject to endorsement by the Culture Sector Board, Northumberland Tourism, and the NSP Board and Executive. Endorsement undertaken by Northumberland Tourism is on the basis of the following three 'light touch' assessment formulae as an overarching principle in identifying the priority programmes, activities and projects in this ATMaP:

- Do what we currently do, but with higher quality (see 2.3.1)
- Follow the 'Need and Opportunity' hierarchy (see 2.3.2)
- Be guided by the outline project assessment criteria (see 2.3.3).

When projects have received endorsement, NSP core team are then responsible for leading on project development and co-ordination. This is done in conjunction with Northumberland Tourism and at all appropriate opportunities Northumberland Tourism are actively involved in project development. The thorough development process is a proven process which assesses the ability of organisations to deliver a project, whilst also enabling Northumberland Tourism to assess project contribution to the ATMaP objectives.

Northumberland Tourism has an interest to work with any project / programme developer to ensure they fit the needs identified with the ATMaP, regardless of whether or not they require public funding.

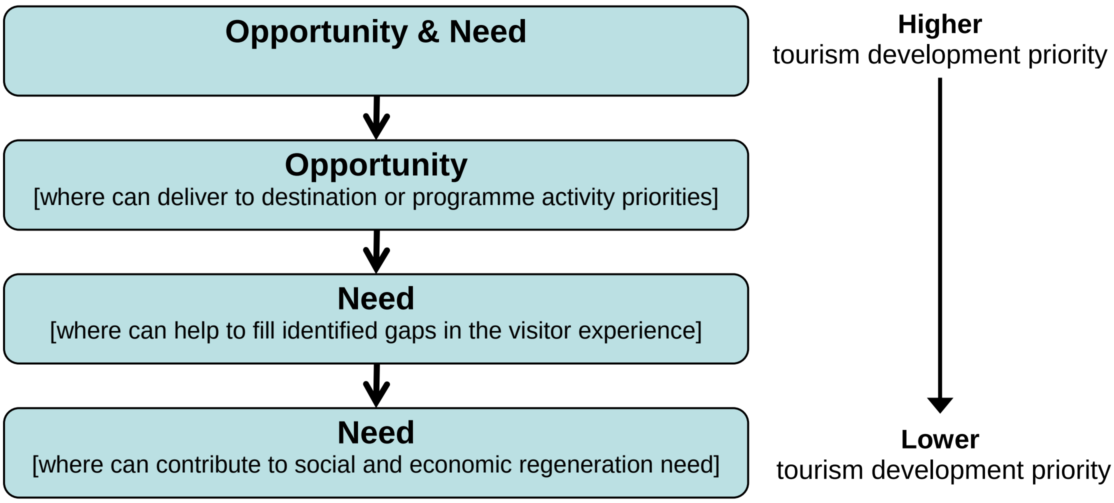
2.3.1 Do What We Currently Do, but with Higher Quality

The visitor market is expanding, but so is the competition, and developing more of the same will fail to realise the full potential of Northumberland. This ATMaP (and the tourism brand developed by Northumberland Tourism) identifies several of Northumberland's strengths, including its natural and built heritage, tranquillity, and historic market towns. Overall, to develop its visitor economy, Northumberland should first play to its strengths – continue with what it currently is doing, but to better quality.

> In other words, not necessarily doing different *things;* just doing things *differently* – playing on Northumberland's strengths to improve the quality of the visitor experience.

2.3.2 Need and Opportunity Hierarchy

Another prioritisation tool which can be used to help focus partners' efforts and identify key programmes and projects is the 'opportunity and need' hierarchy.



The aim is to ensure that activities are undertaken which meet the requirements of the *visitor market* as a priority. This is rather than, for example, because they receive popular support locally, or are artificially accelerated in order to address a social development need, where in fact there may be little tourism rationale behind it.

2.3.3 Outline Project Assessment Criteria

The following table outlines the assessment criteria which have been developed based on the Regional Tourism Strategy's objectives, towards which all Area Tourism Partnerships, including Northumberland Tourism, deliver. Capital projects in particular need to demonstrate how they meet the requirements set out below, addressing issues and questions arising within each:

1	Strategic fit	Which regional and sub-regional tourism objectives will the project help to meet?
2	Evidence of need	Is there a market need for the proposal? Can the proposal meet this need? What are the competitive projects in the region and wider?
3	Return on Investment and Value for Money	Has the project been costed accurately? Has an options appraisal been carried out?
4	Appropriateness of funding streams	Public sector funding is often not the most appropriate way of funding projects. If it has been identified, why is it needed?
5	Viability	Will public funding always be needed to support the project in the long term? If not, what is the exit strategy from public funding?
6	Deliverability	When will the project be ready to implement? Will it be completed on time and on budget? What risks have been identified?
7	Evaluation and monitoring	What evaluation and monitoring processes are embedded in the project? This is particularly important for projects with public funding, but is best practice for all projects. What will success look like, and how will it be measured?
8	Sustainability	What sustainability measures have been considered? (For example local sourcing, community focus, environmentally sound, etc)
9	Measures of success (VICE)	How will the project balance the needs of the four beneficiaries of tourism activity: Visitors, Industry (businesses), Community and Environment? (See Appendix E)
10	Quality	What is the quality aspiration of the project? Does it aspire to be the best of its kind?
11	Contingency plans	What are the risks of over or under achievement, and are there any contingency plans in place?

A similar approach to these assessment criteria is also used to identify the programme activities and the destination management areas outlined in Section 1.1 ('Priorities for Northumberland'). In addition, a version is also used to help Northumberland Tourism target its business support, for example in offering one-to-one business advice, and providing letters of support for development proposals.

3. ATMaP Context and Background

3.1 Strategic Framework: Vision and Aims

This Northumberland Area Tourism Management Plan (ATMaP) is not itself a strategy. Rather it is an implementation plan that describes how the Northumberland visitor economy can contribute towards the county and the region's economic and cultural targets. These are expressed in a number of key strategic documents, including the Regional Tourism Strategy and Regional Economic Strategy and the Northumberland Cultural Strategy, briefly summarised below.

The agreed vision for tourism in North East England for the first decade of the 21st Century is expressed in the current Regional Tourism Strategy:

Tourism Vision for the North East

The North East of England will become a sought after destination 365 days a year - for leisure and business visitors - with activities, attractions, facilities and accommodation that consistently exceed visitor expectations.

Northumberland shares this vision with the region, which it complements with its own tourism vision for the county:

Tourism Vision for Northumberland

The vision of Northumberland is to establish the county as a premier rural destination in the UK, balancing the needs and expectations of the international and UK visitor, businesses and communities whilst protecting and further developing the County's exceptional environment and rich cultural heritage.

The Northumberland vision is strongly based on the 'VICE' model for sustainable tourism, described in more detail in Appendix E.

Northumberland Tourism seeks to realise these visions through a series of strategic aims and objectives, as listed in Section 1.1.

This Northumberland ATMaP does not sit in isolation but is part of a family of strategic documents. In this sense the ATMaP is not itself a strategy but an implementation plan which describes how the Northumberland visitor economy can contribute towards the county and the region's economic and cultural targets. The most important strategies in relation to the ATMaP are outlined below:

<u>National</u>

The **National Tourism Policy** *Winning: A Tourism Strategy for 2012 and Beyond* aims to 'improve the quality of life for all through cultural and sporting activities, support the pursuit of excellence, and champion the tourism, creative and leisure industries'. The vision is:

- To grow the UK visitor economy faster than would otherwise be possible
- To spread the conomic benefits through the UK
- To boost both international and domestic tourism
- To create a truly world class tourism industry
- To secure a lasting legacy through sustained growth after 2012.

Regional

Published by One NorthEast in January 2005, the **Regional Tourism Strategy (RTS) 2005-2010** aims to increase the economic contribution of tourism through the objectives set out in Section 3.2.1, and is the principle guiding document for the Northumberland ATMaP. The main targets set by the strategy are set out alongside Northumberland's own targets in Section 3.2.2. A new RTS is due to be published in March 2009.

The **Regional Economic Strategy (RES)** identified Tourism and Hospitality as one of nine key sectors. The RES was signed off in 2006 and the linked Action Plan was finalised in 2007. The vision for the region is: 'The North East will be a region where present and future generations have a high quality of life. It will be a vibrant, self-reliant, ambitious and outward-looking region featuring a dynamic economy, a healthy environment and a distinctive culture. Everyone will have the opportunity to realise their full potential.'

The RES aims to:
- Increase GVA per person to 90% of the national average
- Increase employment by between 61,000 and 73,000 new jobs
- Create between 18,500 and 22,000 new businesses over the next 10 years.

The **Sub-National Review** introduced the notion of the **Integrated Regional Strategy** (IRS), to be led by the Regional Development Agency (One NorthEast) in partnership with key bodies including local authorities. The current focus is on developing the evidence base. The IRS will build on existing strategic consensus (eg RES and Regional Spatial Strategy).

A review of the **Marketing Framework 2006-2008** has recently been completed and a new Framework document is being prepared, for publication in November 2008.

Sub-Regional (County)

Published by Northumberland Strategic Partnership **Releasing the Strength of Our Communities** is the **Sustainable Community Strategy for Northumberland to 2021**. This revised community strategy was published in September 2007 and addresses the issues that are important to our communities. It sets out in detail how the Partnership will work to make our county even better for those who live, work and visit here. The SCS presents a vision of the county in 2021 and sets out the key actions to get there.

There are 7 key aims in the strategy, including 'Raising the standards of living and building businesses'. Another aim, 'Celebrating and sharing our culture, heritage and creativity', includes the following objectives within it:
- Celebrating the distinctiveness of the county
- Providing inspirational events
- Making the most of our creativity
- Welcoming visitors

Releasing the Strength of Our Communities - the Sustainable Community Strategy for Northumberland to 2021 is available from:
http://northumberlandtogether.org.uk/dms/docs/05_SCS_Full_Doc_Sep07.pdf
http://northumberlandtogether.org.uk/dms/docs/04_SCS_Exec_Summary_Sep07.pdf
(executive summary)

The short-term action plan that accompanies the Sustainable Community Strategy is the **Northumberland Local Area Agreement 'Working Together'**. Originally published in May 2006, the revised rolling plan currently covers the period 2008-11 and is reviewed annually. The LAA is a contract between Northumberland and central government setting out what targets will be achieved over the next 3 years.

There are around 70 targets in the agreement, and these fit within the broad aims of the Sustainable Community Strategy but set out in more detail how these aims will be achieved, and reflect local needs and aspirations. In relation to tourism specifically, the LAA seeks to increase visitor spend from £62 per person to £75 by 2011, and to create 600 addition jobs in the tourist industry by 2011.

The Northumberland LAA "Working Together" (2008-11) is available from:
http://northumberlandtogether.org.uk/dms/docs/06_Revised_Northumberland_LAA_2008_11_Mar08.doc

Another key document for the county is the **State of Northumberland Economic Assessment** which provides a picture of the economy in Northumberland and compares that with regional and national equivalents. It also considers the economic and social trends that may affect our economy in the future and sets out potential opportunities for change and growth. The last published document was made available in 2005, and updated statistics were added in 2006. A new economic assessment is due for publication by December 2008.

One of the key statistics that the assessment monitors is the influence of tourism on the county, recognising that a healthy tourism economy will create more jobs in the county.

State of Northumberland 2005 is available from:
http://www.northumberlandinfonet.org.uk/Media/Reports/StateNLand05.pdf
Updated statistics for 2006 are at:
http://www.northumberlandinfonet.org.uk/KeyStats/StateOfNorthumberland/State%20of%20Northumberland%20Update%2006.xls

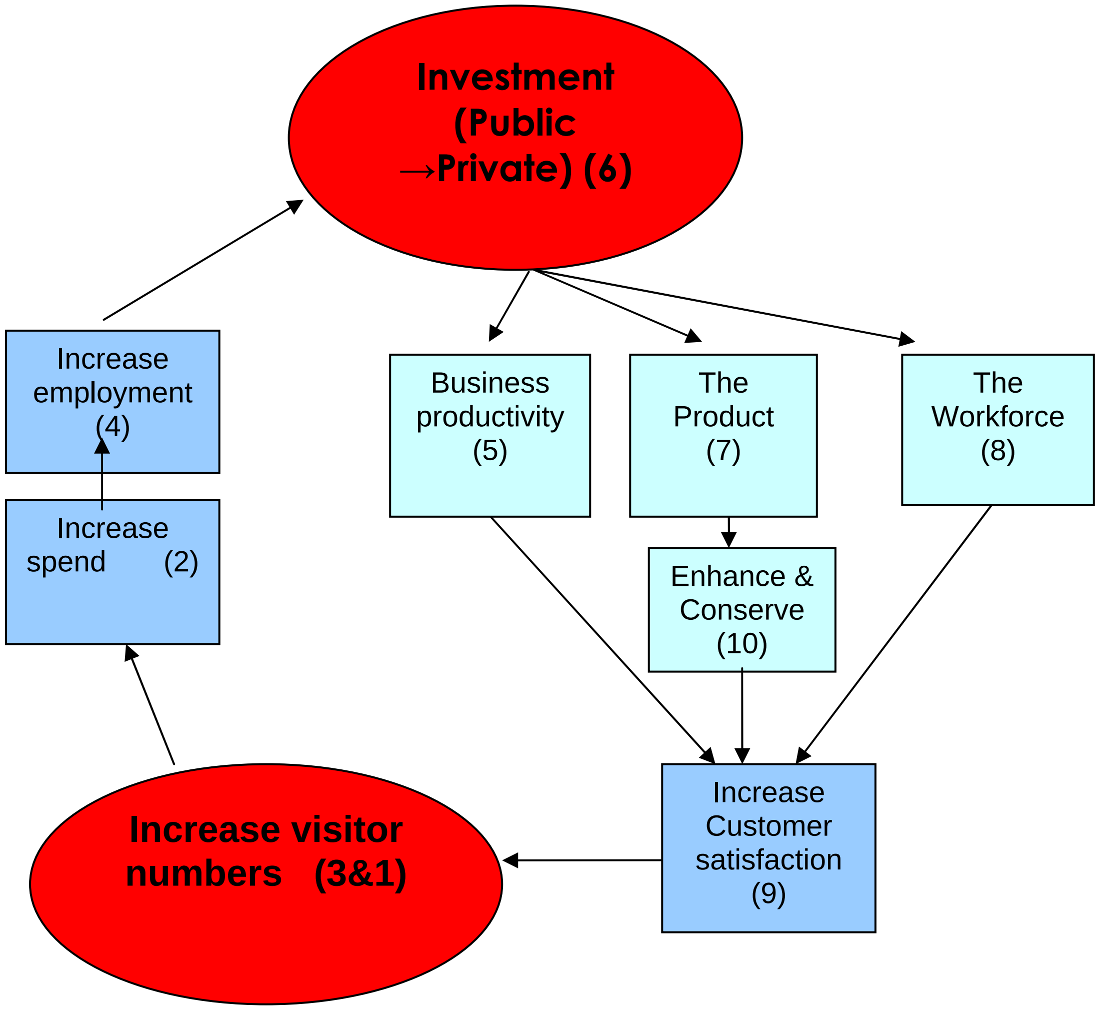
3.2 Objectives and Targets

3.2.1 Regional Targets

The Regional Tourism Strategy sets 10 major objectives for the region to achieve by 2010. Northumberland Tourism has adopted these same 10 objectives:

1 – Attract more domestic and international visitors
2 – Increase tourists' average spend
3 – Increase visits throughout the year, not solely in the main holiday season
4 – Increase employment in the visitor economy
5 – Improve the productivity of the tourism economy
6 – Accelerate the rate of investment in the tourism product, and in other business sectors
7 – Improve the quality of the tourism product
8 – Improve the quality of the tourism workforce
9 – Improve levels of visitor satisfaction
10 – Enhance and conserve Northumberland's natural, heritage and cultural assets.

The diagram below illustrates the virtuous circle of investment and development which we consider links these objectives together. The key points for intervention are in **Investment** (where public investment will be used to stimulate private investment) and in **Increasing Visitor Numbers**. The numbers on the diagram refer to the objective number which is detailed in this section of the ATMaP.



Thus the priority objectives to help us achieve our vision are:

Objective 6: Accelerate the rate of investment in the tourism product, and in other business sectors which will achieve the improvements in products and services necessary to establish Northumberland as a premier destination. This will be achieved through investment firstly by the public sector which will in turn stimulate private sector investment.
Objective 1: Attract more domestic and international visitors to grow the business.
Objective 3: Increase visits throughout the year, not solely in the main holiday season, which will secure more visitors spending more and ensure a sustainable tourism industry.

3.2.2 Regional objectives monitoring and sub-regional delivery

This section of the Northumberland ATMaP repeats the regional targets, and then identifies the target contribution that Northumberland will make towards these objectives. Programme activity is also linked against RTS objectives, as tabled in Section 1.2. Some objectives still require regional baselines to be set, and where there is no means of measuring progress towards objectives Northumberland Tourism has chosen not to set targets.

These targets were set in 2006 when the original ATMaP was drawn up in consultation with the wider partnership. They will be updated in 2009 with the next substantial review of the ATMaP.

Objective 1: Attract more domestic and international visitors

Regional Targets
Increase UK market share to 5% of domestic visits (staying at least one night) and 3% of international visits by 2010. Based on 2003 figures, this represents an increase of 1.3 million domestic visits a year and 0.7 million international visits.

A pro-rata target for Northumberland would require Northumberland (which received 22% of regional visits in 2005) to increase its number of UK annual overnight visits by 280,000 from 2m visits per year in 2005 to 2.2m visits a year by 2010. For international tourists, a pro-rata target for Northumberland (which in 2003 received 10% of all international trips to the region) would require Northumberland to increase its number of international tourists by 70,000 a year by 2010.

Northumberland Targets: UK and International Tourist Visits

- As Northumberland increased its tourist visits by 560,000 between 2000 and 2005 an ambitious target for Northumberland would be to increase the numbers of annual overnight tourist visits by 340,000 to 2.34m visits a year by 2010 (a 17% increase).
- A more detailed target broken down into UK and international visits will be determined based on 2005 international visits.

Source data: UK data provided by the STEAM report undertaken by ONE annually. Overseas data provided by the International Passenger Survey undertaken by the Office for National Statistics annually.

Notes:
*It should be noted that the majority of marketing spend is held by ONE.

Activities related to this objective

Activity	Project reference	Measure
Destination marketing	G1	• Brochures distributed / conversion • Website visits • Online bookings • Value of media coverage
Low season marketing campaigns	G2	• Website visits, media coverage, business referrals, bookings
International marketing	G3	• Value of media coverage • Advertisements / campaigns

		managed & leads generated
E-business platform	G4	• Businesses registered • Businesses trading online • Online transactions
Magnet attraction projects	G6	• Attraction business trends • Attraction visitor survey
New, sustainable attractions	G8	• Attraction business trends
Annual events programme	G9	• Event visitor survey

Objective 2: Increase tourists' average spend

Regional Targets
Domestic visitors: £180 per trip by 2010
International Visitors: £500 per trip by 2010
Day Visitors: £28 per trip by 2010

Northumberland Targets: Tourist Spend

- *According to UKTS, the average spend per trip by tourists in Northumberland in 2003 was £137 for UK visitors and £220 per trip for International visitors. The domestic target therefore seems an ambitious but achievable target for Northumberland but a more reasonable target for international visits would be £300 per trip.

Notes:
*Spend data (and therefore targets) to be revised pending receipt of the North East Visitor Survey 2005/6. Indications are that spend in Northumberland substantially exceeds national averages.

Activities related to this objective

Activity	**Project reference**	**Measure**
Magnet attraction projects	G5	• Spend per head
Destination marketing	G1	• Visitor survey
Developments at attractions	G7	• Spend per head

Objective 3 – Increase visits throughout the year, not solely in the main holiday season

Regional Target
Increase average bedroom occupancy rates to at least 50% in each quarter.

Northumberland Targets: Seasonal Occupancy and Visits

- Accommodation*

Ambitious targets for 2010, based on the three year rolling averages for bedroom occupancies in 2002-2005 in Northumberland are:

Serviced Accommodation

Q1: January to March: 30%	Target: 35%
Q2: April to June: 56%	Target: 59%

Q3: July – September: 70% Target: 73% Q4: October – December: 39% Target: 50% Un-serviced Accommodation Q1: January to March: 30% Target: 35% Q2: April to June: 64% Target: 67% Q3: July – September: 82% Target: 85% Q4: October – December: 44% Target: 50% • Visits to Attractions** No seasonal data available

Source Data: Occupancy surveys by NTB / ONE

Notes:
*Research required to better understand demand for increased occupancy in quarters 1 and 4. There is unsubstantiated evidence that some 'lifestyle' businesses prefer to close or undertrade during these periods.
*It should be noted that the majority of marketing spend for seasonal campaigns is held by ONE.
**No statistics on monthly visits is held by ONE. NT will need to source this data directly.

Activities related to this objective

Activity	**Project reference**	**Measure**
Destination marketing	G1	• Brochures conversion research • Website visits • Online bookings • Timing & content of media coverage
Low season marketing campaigns	G2	• Website visits, media coverage, business referrals, bookings
Magnet attraction projects	G6	• Attraction business trends
Events programme	G10	• Event visitor survey
Developments at attractions	G7	• Attraction business trends

<u>Objective 4 – Increase employment in the Visitor Economy</u>

Regional Target
No target currently specified

Northumberland Target: Employment in the Visitor Economy
*Target pending clarification of 2001-2005 trend data: • In 2004, employment in the visitor economy in Northumberland stood at around 9,000 FTE jobs. An increase of 1,100 additional FTE jobs (12% growth) is therefore a challenging target for 2010. Using a relatively low rate of £5,000 per job created, this would justify £5.5 million of public sector support in the Northumberland Visitor Economy from 2006 to 2010 (£1.1 million per year).

Source data: STEAM report undertaken by ONE annually.

Notes:
*STEAM data for 2000-2005 went under review in Oct 2006, when expenditure and employment outputs altered considerably due to changes in input data.

Activities related to this objective

Activity	Project reference	Measure
Magnet attractions projects	G6	• Jobs created directly and indirectly
New sustainable attractions	G8	• Jobs created directly and indirectly
Developments at attractions	G7	• Jobs created directly and indirectly
Business training and support	S6	• Businesses supported – attributable growth & development

<u>Objective 5 – Improve the productivity of the tourism economy</u>

Regional Target
Appropriate baseline and measurable targets to be established.

No target set for Northumberland as no means of measuring this objective exists.

<u>Objective 6 – Accelerate the rate of investment in the tourism product, and in other business sectors</u>

Regional Target
Increase the annual capital spend every year, above inflation in tourism product. No target has been set as a means of measurement has yet to be established.

The regional objective does not refer to investment outside of the tourism sector. However, a key aim of the Northumberland ATMaP is to stimulate wider benefits to the economy through local supply chains. No targets have been set, but actions will impact on this objective.

Activities related to this objective

Activity	Project reference	Measure
Magnet attractions projects	G6	• Investment in tourism product directly attributable to increased visits and changes in visitor profile • New products and services created directly attributable to changes in demand and support given to businesses
Improve food offer	G9	• New products and services created directly attributable to changes in demand and support given to businesses
Improve retail offer	G11	• New products and services created directly attributable to changes in demand and support given to businesses
Improve cycle & walking routes	G5	• Visitor survey (subject to rural survey)

Objective 7 – Improve the quality of the Tourism Product

Regional Targets

Accommodation:	85% of businesses participating in the national quality inspection scheme by 2010
Attractions:	50% of attractions participating in the VAQAS scheme by 2010

In 2006 the rate of participation in accommodation inspection in Northumberland was 56% of a total of 1433 properties. Rates of participation in the VAQAS scheme are unknown.

Northumberland Target: Improving Quality

- Accommodation: To encourage the following additional numbers of businesses to participate in the inspection scheme: 2007 – 20 businesses; 2008 – 50; 2009 – 100; 2010 – 200. A total of 370 additional inspected properties, bringing the rate of participation to 81%.
- Attractions: Baseline data to be established and benefits of the inspection scheme to be better understood.

Source data: Properties inspected under national accreditation schemes, data provided by inspection agencies.

Activities related to this objective

Activity	**Project reference**	**Measure**
Promote participation in accommodation inspection	S5	• Businesses briefed, businesses newly accredited
Developments at attractions	G7	• Businesses accredited
Improve cycle & walking routes	G5	• Developments completed
Magnet attraction projects	G6	• Demand created by changes in attraction visitor profile. Attraction visitor survey
Outdoor activities	S4	• Developments completed
Improve public transport	S8	• Improvements delivered

Objective 8 – Improve the quality of the tourism workforce

Regional Target
The current baseline is still to be established.

Northumberland Targets: Quality of Workforce

Baseline data and means of measuring to be established. Possible targets could include:

- Increase the percentage of tourism employees who have accessed workforce training in the preceeding 3 years from X% to x% by 2007, and X% by 2010. This will require XXX employees to undergo training by 2010.
- Increase the percentage of the tourism workforce with recognised qualifications from X% to X%, requiring XX employees to gain qualifications by 2010.

Notes:
Training will be provided by external agencies including Business Link, ONE, CoVE and others. Targets will be largely dependent on these agencies' resources and performance.

Activities related to this objective

Activity	**Project reference**	**Measure**
Provide business training & support	S6	• Business Link measurements • Number of businesses / employees provided with training
Improve food offer	G9	• Businesses supported • Businesses initiating change
E-business awareness	G4	• Businesses trading online
Improve retail offer	G11	• Businesses supported • Businesses initiating change

Objective 9 – Improve levels of visitor satisfaction

Regional Target
Appropriate baseline and measurable targets to be established

Northumberland Targets: Visitor Satisfaction

Current visitor satisfaction levels in Northumberland market towns are set out in Appendix A.

- By 2010 to have achieved national average in food, retail and evening entertainment categories.
- By 2010 to have improved Northumberland's above average performance in TIC, accommodation, and welcome categories.
- Additional research into visitor satisfaction in rural areas is required.

Source data: NSP Market Towns Survey 2003.

Activities related to this objective

Activity	**Project reference**	**Measure**
Improve food offer	G9	• Visitor survey
Improve retail offer	G11	• Visitor survey
Improve Visitor Contact Network	S2	• Visitor survey
Improve cycle & walking routes	G5	• Visitor survey
Magnet attraction projects	G6	• Visitor survey
Events programme	G10	• Visitor survey
Accommodation quality	S5	• Visitor survey
Tourism skills training	S6	• Visitor survey
Developments at attractions	G7	• Visitor survey
Outdoor activities	S4	• Visitor survey
Improve retail offer	G11	• Visitor survey

Objective 10 - Enhance and conserve Northumberland's natural, heritage and cultural assets

Northumberland Tourism supports the spirit of this objective throughout all activities. As such no single target for sustainable tourism has been set.

3.3 Industry Performance

3.3.1 The National Context

Tourism is one of the largest industries in the UK, accounting for 2.9% of UK Gross Value Added and sustaining over 2 million jobs, either directly or indirectly. Approximately 1.45 million jobs are directly related to tourism, which equates to 5% of people in employment in the UK. (Source: Office for National Statistics and DCMS – figures relate to June 2007). Tourism was worth approximately £85.6 billion in 2006, including spending by visitors (UK and international), fares to UK carriers, day trips and rent for second home ownership. (Source: VisitBritain)

In 2007 ***UK residents*** took 120.2 million overnight trips within the UK, spending £20.8 billion. Trips have declined by an average 5% per year over the last five years, and spend by 4% per year. (Source: UKTS).

32.6 million ***international visitors*** visited the UK, spending £16 billion. Trips have increased by an average of 6% per year over the last five years, and spend by 6.5%. (Source: IPS). The top five inbound markets are USA, Germany, France, Irish Republic and Spain, and key emerging markets have been identified as China, India and the new European countries.

45% of trips by UK residents were for ***holidays,*** 16% were ***business*** trips and 40% were ***visits to friends and relatives***. As would be expected, business trips are concentrated in urban areas, and Visiting Friends and Relatives (VFR) trips are also concentrated in centres of population. Holiday trips, however, are more evenly distributed between different types of location. 27% of international visits were for business, 33% for holidays, 30% VFR and 11% "other".

UK ***room occupancy rates*** in serviced accommodation have increased slightly over the last five years, from 59% in 2003 to 62% in 2007. Hotels have consistently higher occupancy rates than B&Bs (67% and 44% in 2007), and properties in large towns have higher rates than those in the countryside (72% and 50%).

Visits to Attractions increased by 3% from 2005 to 2006, with the strongest growth in visits to museums and galleries, historic properties and places of worship. In general indoor attractions fared well in 2006 as a result of the poor weather, while in 2005 the good weather favoured outdoor attractions.

3.3.2 The Regional Context

The North East economy is undergoing profound structural change, moving from a largely industrial to a knowledge-driven economy. The region had the fastest growing economy in the UK in per capita terms for both 2005 and 2006. Regional economic policy focuses on the 'three pillars' of energy and the environment, health care and health sciences and process industries.

Tourism supports, directly and indirectly, 64,300 FTE jobs in the region (5.8% of the region's workers). It contributes 4.6% of the region's GVA (£1.7bn) (Durham University).

Overall, the number of overnight visitors to the region increased by 11% from 2003 to 2006, with particularly strong growth between 2003 and 2005. The greatest increase has been in visitors staying with friends and relatives, although those staying in commercial accommodation have also shown a healthy increase. The number of visitors from the UK has fallen over the last five years, inline with national trends, while the number of international visitors has increased by 28%. Recently DFDS has ceased operating ferries from Stavanger to Newcastle, but new air routes have opened from Stavanger, Copenhagen, Dublin and Brussels, as well as the Emirates route to Dubai which opens up the Australasian market.

Capital investment in tourism has been strong over the last five years, with several new attractions opening such as The Sage Gateshead, Locomotion (Shildon), Woodhorn (Northumberland), Alnwick Garden and Middlesbrough Institute for Modern Art. New accommodation establishments have also opened, however, occupancy rates and visitor numbers to attractions have held up, with hotel room occupancy increasing from 56% (2003) to 71% (2007) and self catering unit occupancy increasing from 54% to 60%. This indicates that demand remains strong, particularly in urban areas, although there are indications that there is an over-supply in the rural areas, particularly in the guesthouse / B&B sector.

Further developments are due to open in the next two years including Beamish and the Great North Museum, while the Kielder Big Picture project represents £30m investment over the next 10 years. Further hotel development is also underway. This shows that the region is regarded as a good place to invest, and there are opportunities to further expand the visitor economy.

3.3.3 Northumberland Performance, Trends and Context

The Visitor Economy is one of Northumberland's most important economic sectors. Approximately **12,700 jobs** (full time equivalents) were supported by direct tourist expenditure in the County, and a further 2,900 jobs were supported by indirect revenue from tourism.

An independent assessment (the STEAM report – see Appendix A) has concluded that **1.9 million overnight tourists** visited Northumberland in 2007, spending 7.7 million nights in the area. In addition 8 million day visits were made in the area.

Overnight visitors spent £296 million in the County with day visitors spending a further £154 million. When indirect revenue of £260 million is taken into account, the total **contribution of tourism to the Northumberland economy in 2007 was £710 million.**

At least three quarters of overnight visitor days in Northumberland are spent in **non-serviced accommodation**; however visitors in serviced accommodation have a higher spend per day. Average expenditure per day is £38.23 for overnight visitors and £19.03 for day visitors.

Direct **tourism revenue has increased by 12% since 2003** despite a fall in the number of trips taken to the county during the same period. A 24% increase in the number of days spent by overnight visitors in the county helped to see a growth of 8% in all visitor days. **Direct employment in tourism has risen by 11%** between 2003 and 2007.

However there is still scope for more growth. Tourism in the County remains **highly seasonal**, with the summer period (July to September) accounting for over a third of all tourist days. Seasonality is particularly marked in non-serviced accommodation. This leads to low status for many jobs, a lack of good training opportunities for many staff in the industry, difficult cash flow problems for business and an inability to attract significant inward investment, compared to elsewhere in the region. A further major problem identified by visitor surveys is that many visitors are relatively disappointed with our food and retail offer, compared to other similar areas of the country.

There is a common view that Northumberland has all the right natural assets to become an even more successful visitor destination, but has yet to take full advantage of them.

A number of trends are discernable:

<u>Rural diversification</u> – The trend to convert farm buildings to accommodation, retail and food service continues. Estates are becoming increasingly sophisticated in their understanding of the visitor economy, the opportunities it provides, and how to realise them e.g. Ford & Etal, Blagdon, Eshott, Meldon, Northumberland Estates.

<u>Food, Drink and Retail Products</u> – Visitor surveys demonstrate that demand for locally distinctive food, drink and retail products outstrips availability. An increasing number of producers are now entering the tourism market, but difficulties in distribution and processing, and relatively low awareness of market demand amongst mainstream tourism businesses, constrain growth.

<u>Market towns as leisure / tourism centres</u> – Whilst still vital as local service centres, studies of market towns[3] have identified the need for towns to increasingly focus on providing high quality, locally distinctive leisure services to residents and visitors alike. The future for Northumberland's market towns increasingly lies in attracting more high spending, year round visits that will support independent shops, restaurants, cafes, entertainment and accommodation.

<u>Attractions as key drivers of growth</u> – Since 2001, one in five accommodation / hospitality / retail businesses established in Alnwick / Alnmouth stated that the Alnwick Garden had positively influenced their decision to start a business[4]. 25% of established businesses stated that the garden had influenced their decision to invest in improvements. There is no doubt that investment into, and the success of, key attractions such as Cragside, Woodhorn, Hadrians Wall, and Kielder Water & Forest Park acts as a catalyst for business growth in the wider economy.

[3] Market Town Retail Distinctiveness 2007, and Market Town Welcome 2008
[4] 'The Impact of The Alnwick Garden' NSP evaluation 2008

The Market

The Visitor – Northumberland attracts higher than the national and regional average of couples and families, most of whom are 35 years +, 69% ABC1, and most come from London, the South East, and the Midlands. 33% are first time visitors. Most domestic visitors stay for an average of 7 days (overseas visitors stay 2 days). In the last two years these people also took breaks in the Lake District, Scotland, Wales, Edinburgh, London, Cornwall, and York.

Once visited, loyalty is exceptionally high, with 98% recommending the county to friends and family. They love the people, the countryside and the history. Top activities are visiting attractions, eating out, shopping, towns and villages, walking and cycling.

Negatives include the quality of public transport, eating out, and shopping.

Potential visitors – Trends towards relaxing, active, authentic and distinctive holidays favour Northumberland[5].

Research into attitudes of Northumberland[6] amongst target customers has revealed the following:

- Low awareness of Northumberland and its offer
- Top reasons to visit are the 'National Park', 'Hadrian's Wall', and the 'Northumberland Coast' – constituting 3 of the 5 strongest attractors in the North East
- Phrases associated with the county are 'Breath Taking', 'Close to Nature' and 'Invigorating'. Hadrian's Wall is considered an iconic attraction
- The coastal resorts of Berwick upon Tweed are disappointing
- Hard to get to and far away
- Cold weather

The Tourism Product – In October 2008, the tourism database Desti.ne records over 1500 primary tourism businesses:

Business Type	**Key Sub-Set**	
Accommodation		1380
	Self Catering	648
	B&B / Inn	308
	Hotel	41
Attractions		130
Leisure /activity operators		101
Restaurants		158*

*Records for places to eat are provisional in 2008.

Business Performance & Skills – Northumberland's businesses perform exceptionally well in national league tables of award winners, regularly represented at the England for Excellence awards. Yet the county as a whole lags behind the region when measured against indicators of modern business practice such as use of the internet:

[5] Henley Centre for Research, and Mintel
[6] 2006 Non-Visitor Research, and 2008 focus groups

Regional e-Business Survey 2006	Businesses taking online bookings	Businesses on agency websites	Place search engine adverts	Bookings via tourism websites	Use of e-mail marketing
Co Durham	40	28	37	44	21
Tees Valley	48	n/a	33	30	11
Tyne & Wear	34	27	31	36	26
Northumberland	**12**	**10**	**22**	**9**	**11**

3.3.4 The Structure of the Northumberland Visitor Economy

Tourism in Northumberland is, for the most part, made up of a large number of very small companies, many employing 5 or less people. In Northumberland, there are over 1500 tourist accommodation and attraction businesses. However, it also demonstrates great scope in its multiplier effect. Pubs, restaurants, cinemas, shops, petrol stations, public transport, artists, craft makers and galleries are some of the more obvious beneficiaries of tourism, but it also brings in substantial business to many other sectors of the economy from food and drink to building services, printers, accountants and solicitors. Fuller details are provided in Appendix F.

3.4 The Tourism Offer: Products and Experiences

3.4.1 Key Products and Experiences

Northumberland's key tourism assets are its:

- Coast & Countryside: including Northumberland National Park, Northumberland Coast AONB, Kielder Water and Forest Park, North Pennines AONB, and the major river valleys of North Tyne, South Tyne, Coquet, Aln and Tweed; Scenery, open spaces, tranquillity, long sandy beaches
- History and Heritage: Hadrian's Wall, the many castles, Berwick's Elizabethan Town Walls, industrial heritage, Christian heritage, Reivers (family names)
- Gardens: The Alnwick Garden complemented by many others including Cragside, Wallington and Belsay
- Outdoor activities: including walking, cycling, fishing, golf and wildlife watching
- Local culture: including friendly people, music (traditional and new), agricultural shows, festivals, food fairs, the Northumberland flag, famous people, 'Harry Potter' and other film and TV venues
- Historic and attractive market towns and villages.

It is significant that its two most important assets: Coast & Countryside and History & Heritage are also two of the four main themes identified for the North East England Regional Image Campaign: 'Passionate People, Passionate Places'.

Three magnet attractions were identified for Northumberland in the Northumberland Cultural Strategy 2002-2008 – Hadrian's Wall, The Alnwick Garden and The Woodhorn Museum. Since then, Kielder Water and Forest Park has been added.

A tourism branding review for Northumberland conducted in 2006 concluded that **The Northumberland Tourism Brand Essence:** Northumberland is England's most relaxing county, its tranquillity matched only by its choice of activities and attractions.

Relaxation, the warmth of welcome and a sense of refreshment are widely agreed to be the main emotional benefits of a holiday or leisure visit to Northumberland. The 'tourism in Northumberland' brand is due to be refreshed in 2008-09 and is likely to reflect that.

3.4.2 Strengths, Weaknesses, Opportunities and Threats

A SWOT analysis to review the county's strengths, weaknesses, opportunities and threats is a useful framework to begin a more detailed consideration of the major issues. The SWOT analysis clearly points towards Northumberland being a tourism product that is especially appealing to those who like 'the great outdoors' in a beautiful and quiet part of England. In addition, all the major tourist attractions of the county (charging admission) have a significant element of history or heritage associated with them. The area has the added advantage of being more accessible to many major catchment areas (centres of population) than similar destinations in Scotland. The county can also benefit from the proximity of the vibrant cultural attractions of NewcastleGateshead.

However, the industry is highly seasonal, leading to low investment and low status of many jobs. The county lacks extensive attractions for children (particularly in wet weather) and has little evening entertainment. Visitors express relatively low levels of satisfaction with the food and shopping offer (compared to other similar areas) and the county also suffers from a general lack of awareness as a holiday destination.

Complementing the 'SWOT' analysis, is a summary of an assessment by Local Authority Tourism and Regeneration Officers about the tourism activities that could be delivered more successfully in the future if additional resources (staff and funding) were made available through new partnership arrangements

Tourism in Northumberland – Strengths, Weaknesses, Opportunities and Threats

Strengths	**Weaknesses**
- The diversity of attractions (lots to see and do) - Clean, empty and dramatic beaches - Wide open landscape and countryside - History and heritage, especially the best remains of Hadrian's Wall, Holy Island, Berwick's Elizabethan Town Walls and the many castles - Gardens, especially The Alnwick Garden - Traffic free / quiet / peaceful - Perceived value for money - Ease of access, especially the A1 - Near / on the way to Scotland - Close to NewcastleGateshead - Outdoor activities, especially walking, cycling, golf, fishing and wildlife watching - Attractive market towns and villages	- Few large capacity hotels - Perceived remoteness - Tourists to Scotland passing through without stopping - Very seasonal industry - Relatively low levels of visitor satisfaction with the overall quality of our food and shopping offer - General lack of knowledge about the county in the wider population - Perceived cold weather and lack of all weather facilities - Lack of facilities and attractions for younger children; and of night life / evening entertainment for adults - Many attractions close in winter

Opportunities	**Threats**
- Improved partnership working - Increased investment in marketing activities to raise the profile of the county - Developing the off season market - Increased range of tourist events, throughout the year - Improved bookability of accommodation through IT solutions - New walking, cycling and riding routes - Golfing holiday packages - Nature based tourism - Continued investments at flagship attractions including Alnwick Garden, Hadrian's Wall and Woodhorn - New Hadrian's Wall Heritage company - Measures to improve the county as an 'environmentally sensitive' tourist area - Increased use of local food - Improved tourism training	- Continued lack of co-ordination amongst tourism agencies - Competition from Scotland, the Lake District and other rural areas - Competition from European cities (short breaks) via low cost airlines - M6 / M74 a much faster route than A1 - International situation reducing world tourism - Possible climate change impacts - High value of the pound, especially against the Euro - Continued lack of tourism investment in rural areas, compared to cities - Inadequate public sector funding support (especially compared to Scotland)

'Could Do Better'

Local Authority Tourism and Regeneration Officers in the county have agreed that the following tourism activities could be delivered more successfully in the future if additional resources (staff and funding) were made available through new partnership arrangements and improved joint working:

ADDRESSING SEASONALITY: By encouraging more winter opening of tourist facilities, developing a year-round events programme and low season marketing (including through budget airlines and other transport operators).

IMPROVING THE VISITOR EXPERIENCE: By encouraging and promoting an improved food offer (including opening times, quality and the use of local foods); an improved retail offer (including markets); an improved evening offer (night life / evening entertainment); and improved level of customer service throughout.

QUALITY ISSUES: By lobbying VisitBritain for better handling of accommodation complaints, encouraging greater take-up of appropriate quality accreditation (including attractions), improving the links between tourism and local licensing, and stimulating improvements to the quality of existing attractions.

SUSTAINABILITY ISSUES: By introducing a green tourism accreditation and advice scheme and engaging communities and businesses more effectively in the sustainability agenda, including improving awareness of environmental best practise.

PUBLIC RIGHTS OF WAY: Especially by improving the management and maintenance of cycle and walking routes, with long-distance strategic routes being a priority.

‘WHITE ON BROWN’ TOURISM SIGNPOSTING: By agreeing a county-wide strategy and a consistent approach together with improved co-ordination of specific schemes, such as town and village signing, points of entry signs and signed routes; including appropriate cross-boundary / inter-agency collaboration.

PUBLIC TRANSPORT: By lobbying for a higher priority to be given for public sector support for tourism bus services, improved linkages between services (especially between bus and rail services) and an improved tourism input into local transport plans.

ENCOURAGING INWARD INVESTMENT: By the identification and preparation of appropriate, potential sites (with planning permission) and the promotion of investment opportunities.

ICT ENABLEMENT: By encouraging and helping tourism businesses (especially small and micro-businesses) to make better use of modern ICT tools including the internet, e-mail and on-line booking systems.

3.4.3 Key Themes and Experiences to Market

Appendix G provides details of Northumberland’s most important target markets. Analysis undertaken by Northumberland County Council in 2003 identified the following socio-economic and geographical groups: In the UK these are older or retired couples (45+) from low and middle management positions up to wealthy professionals, together with families who are looking for an alternative to busy resort or city destinations. Yorkshire, Lancashire and Cheshire provide the biggest proportion of visitors to Northumberland, followed by the East and West Midlands. Northumberland attracts relatively few visitors from Scotland (except the large Holiday Parks), Wales or London although there is evidence of increased numbers of visitors in recent years from the South of England.

The key short-haul international markets for Northumberland are The Netherlands, Norway and Germany although even here, it is usually not cost effective for Northumberland to market itself independently, without partners from the rest of the North of England.

The reviewed NE Marketing Framework is due for publication in November 2008, and will inform future revisions of the Northumberland ATMaP.

Ark Model Segmentation

Until recently, market segmentation has followed socio-economic groupings. Now segmentation of visitors adopt the Ark model (adopted by VisitBritain), which seeks to group and identify customers by behavioural patterns and social outlook. Northumberland Tourism, One NorthEast, Kielder Water and Forest Park, and Hadrian’s Wall Heritage use the Ark model.

The following Ark model market segments are Northumberland’s targets, pending more detailed analysis of visitors in 2007 and the reviewed NE Marketing Framework in 2008:

- **Functionals** – Self reliant low spenders, value functionality, arts & culture important

- **Traditionals** – Value good service, unlikely to pay extra, relaxed lifestyle, enjoy intellectual challenges
- **Cosmopolitans** – Do what they want, try new things, willing to pay for more, service important
- **Discoverers** – Independent of mind, style not important, quite high spend but value important

Marketing activity will 'look after' the more numerous, price sensitive Functionals, but efforts will be increasingly geared towards pro-actively stimulating visits from the higher spend Cosmopolitans, Traditionals and Discoverers.

3.5 The Tourism Offer: Major Tourism Investments in Northumberland

3.5.1 Investments in Progress

Appendix H provides details of major tourism capital projects in development in the county, most of which are seeking public funding. Most of this investment has been or is planned for attractions, including the magnet attractions at The Alnwick Garden, Hadrian's Wall and Kielder, rather than for new hotels or other accommodation which is also ongoing. There has also been significant new investment in short and long-distance cycling and walking routes.

In addition, One NorthEast is making significant investment in a range of activities which will support the promotion of tourism in Northumberland. Key among these is the e-business platform Desti.ne for which Northumberland Tourism has not been required to pay any license fees for at least its first three years of operation. This will have an estimated value of around £200,000. In addition to providing a comprehensive Destination Management System, the platform provides a wide range of tried and tested e-commerce and customer relationship management systems that are essential tools for effective tourism marketing and information systems in the 21st Century.

Northumberland will also benefit from, and have the opportunity to participate in, the regional marketing activity of One NorthEast.

The following is a summary table giving a flavour of recent (2008) investments of high level projects, identified by OneNorthEast, that will significantly raise or transform the destination's offer of profile. This information has been extracted from the regional Tourism Investment Monitor, managed by One NorthEast's Regional Tourism Team.

Project	Location / completion	£m	Description	Jobs
Cragside Grounds Enhancement	Morpeth / April 2008	6.0	Improvement and restoration of grounds to renew and improve facilities. Restoration of iron bridge, rewiring of house and reopening of Lord Armstrong's Electric Room	
Golden Sands Holiday Park	Cresswell / July 2009	3.5	350 new static caravans for the site as well as new sports facilities and café	
Stannington Roadside Hotel	Morpeth / August 2008	5.6	Hotel and conference centre with 40 rooms	90

Alnwick Hotel Development	Alnwick / January 2008		54 bed hotel with restaurant, view to extend to 80 rooms if successful	100
Doxford Hall Country House Hotel	Chathill / March 2008	14.0	25 room country house hotel with restaurant and health club	
The Bamburgh Castle Hotel	Seahouses / January 2008	1.5	Hotel transformed into coaching inn and carvery, refurbishment of current rooms and additional 10 added	40

3.5.2 Applications for New Tourism Investment

The importance of improving our product offer is recognised as a primary driver of future growth, and a priority for public sector investment. The development of magnet attractions (new and existing), enhancements to smaller attractions, new activity products and other investment which will build the competitiveness of Northumberland as a destination is encouraged.

County and regional agencies which may be approached for funding and support for developments will refer to the Area Tourism Management Plan. Projects – or at least the programme areas they will clearly help deliver towards – will need to be included within the ATMaP if they are to attract funding from county and regional public sector agencies.

Projects wishing to be included within the ATMaP will need to demonstrate how they will contribute to the objectives of the ATMaP (Section 1.1). They will also need to prove a complementary fit with the core strengths and attractions of their surroundings – a sustainable approach to tourism development. Projects which cannot contribute to key objectives and / or could have a detrimental impact on key neighbouring attractions will not be included with the ATMaP.

Appendices

Appendix A: Tourism Statistics for Northumberland from 2003

STEAM (Scarborough Tourism Economic Activity Model)

Headline Figures 2003 - 2007

STEAM is an independent assessment of the volume and value of tourism in Northumberland by Global Tourism Solutions Ltd. It is based on a detailed review of all the bed spaces in Northumberland, matched against serviced and self catering occupancy rates (from ONE NorthEast surveys) and expenditure surveys.

	2003	2004	2005	2006	2007	% change 2003 - 2007
Tourist Numbers (millions)						
Tourists	1.82	1.86	2.01	1.77	1.92	5.5
Day Visitors	8.34	8.35	8.25	7.99	8.08	-3.1
Total	10.17	10.22	10.26	9.75	10	-1.7
Tourist Expenditure (£ millions) – direct and indirect						
Tourists	380	393	433	408	466	22.6
Day Visitors	252	252	249	241	244	-3.2
Total	632	645	682	648	710	12.3
Employment supported by visitor spending (direct only)						
Accommodation (hotels, self catering, camp sites, etc)	4,033	4,336	4,550	3,903	4,401	9.1
Other Employment (food & drink, recreation, shopping, transport, etc)	7,417	7,379	7,817	7,544	8,357	12.7
Total	11,450	11,715	12,367	11,446	12,758	11.4

In the table above, expenditure data for 2003–07 is based on the 2005/06 regional visitor survey, which is more accurate than the datasources previously used in 2000 – 02. Data for 2003–07 is shown at 2007 prices, ie adjusted for inflation. Therefore meaningful comparisons can only be made for 2003–07 (ie 2000-02 figures are not shown although they are available). Employment data is based on expenditure; therefore again meaningful comparisons can only be made for 2003-07.

Detailed Figures 2003 – 2007

	2003	2004	2005	2006	2007	% change 2003 - 07
Analysis by sector of expenditure (£m) (2007 prices)						
Accommodation	71.19	81.17	84.97	76.43	79.65	11.9
Food & Drink	191.58	190.27	202.92	196.00	219.50	14.6
Recreation	46.63	46.58	48.83	47.03	51.16	9.7
Shopping	36.06	36.00	37.45	36.05	38.40	6.5
Transport	54.67	54.28	57.33	55.40	61.00	11.6
Total Direct Expenditure	***400.13***	***408.30***	***431.51***	***410.91***	***449.71***	***12.4***
VAT	70.02	71.45	75.51	71.91	78.70	12.4
Indirect Expenditure	161.60	165.15	174.78	165.63	181.50	12.3
Total	**631.76**	**644.90**	**681.80**	**648.45**	**709.91**	**12.4**
Revenue by category of visitor (£m) (2007 prices)						
Serviced Accommodation	90.22	108.03	111.35	97.38	99.69	10.5
Non-Serviced Accommodation	249.81	247.88	281.41	270.26	325.91	30.5
SFR	40.17	37.11	40.38	39.94	40.53	0.9
Day Visitors	251.57	251.89	248.66	240.86	243.79	-3.1
Total	**631.76**	**644.90**	**681.80**	**648.45**	**709.91**	**12.4**
Tourist Days (000s)						
Serviced Accommodation	1037	1214	1252	1081	1011	-2.5
Non-Serviced Accommodation	3957	3818	4408	4298	5468	38.2
SFR	1251	1156	1258	1244	1262	0.9
Day Visitors	8343	8353	8246	7988	8085	-3.1
Total Tourist Days 000's	**14588**	**14542**	**15164**	**14611**	**15826**	**8.5**
Tourist Numbers (000s)						
Serviced Accommodation	591	723	748	590	551	-6.8
Non-Serviced Accommodation	708	656	735	655	839	18.5
SFR	524	485	528	521	529	1.1
Day Visitors	8343	8353	8246	7988	8085	-3.1
Total Tourist Numbers 000's	10166	10217	10258	9754	10004	-1.6
Employment supported by visitor spending (FTEs)						
Accommodation	4033	4336	4550	3903	4401	9.1
Food & Drink	4652	4620	4927	4759	5335	14.7
Recreation	1374	1373	1439	1386	1509	9.8
Shopping	798	797	829	798	851	6.6
Transport	593	589	622	601	662	11.7
Total Direct Employment	***11450***	***11715***	***12367***	***11446***	***12758***	***11.4***
Indirect Employment	2589	2646	2800	2654	2911	12.4
Total	**14039**	**14361**	**15167**	**14100**	**15669**	**11.6**

Definitions:

- Tourists: People whose visit involves at least one overnight stay, including business tourism and visiting friends and relatives.
- Day Visitors: Includes visits to tourist attractions, the coast and countryside and speciality shopping trips.

Market Towns Visitor Satisfaction Survey

A large scale satisfaction survey involving over 2,000 face to face interviews with visitors was conducted in 2003 in 9 Market Towns: Alnwick, Amble, Berwick, Haltwhistle, Hexham, Morpeth (2002 data), Rothbury, Seahouses and Wooler. This was the largest survey of its type ever undertaken in England.

The following table shows the % of visitors who said that key features relating to visitor satisfaction were 'Very Good' compared to the national average for all market towns.

	N'land Market Towns	England Average	
Accommodation: Quality of Service	63%	62%	1% above national average
Accommodation Quality of Product	66%	64%	2% above national average
Accommodation: Value for Money	63%	58%	5% above national average
TICs: Quality of Service	58%	52%	6% above national average
Places To Visit: Range	33%	24%	9% above national average
Places To Visit: Level of Interest	37%	31%	6% above national average
Places To Visit: Value for Money	40%	34%	6% above national average
Places To Eat: Range	28%	31%	3% below national average
Places to eat: Quality of Food	33%	38%	5% below national average
Places To Eat: Value for Money	32%	34%	2% below national average
Shopping: Range	21%	23%	2% below national average
Shopping: Quality of goods	25%	28%	3% below national average
Road Signs	46%	40%	6% above national average
Pedestrian signs	39%	29%	10% above national average
Car Parking: Ease of Parking	59%	55%	4% above national average
Car Parking: Cost of Parking	45%	48%	3% below national average
Public Toilets: Availability	35%	27%	8% above national average
Public Toilets: Cleanliness	33%	26%	7% above national average
Street cleanliness	42%	41%	2% above national average
Evening entertainment	18%	21%	3% below national average
General atmosphere of market towns	47%	47%	National average
Feeling of Welcome	51%	48%	3% above national average
Feeling of Safety from Crime	60%	49%	11% above national average
Overall enjoyment of visit	41%	37%	4% above national average
Likelihood of recommending to someone else	60%	56%	4% above national average

A new series of surveys are scheduled to begin in 2009 for the eight towns within the Market Town Welcome programme (Berwick, Wooler, Seahouses, Alnwick, Amble, Morpeth, Hexham and Haltwhistle). The initial results should be available from the end of 2009.

Tourism Business Toolkit – Research and Statistics

The most current market analysis and research about tourism in Northumberland and North East England is available on the regularly updated Tourism Business Toolkit at: http://www.tourismnortheast.co.uk/site/research-and-statistics

Appendix B: Programme Summary: Actions & Resources

This Appendix of the Northumberland Area Tourism Management Plan looks in more detail at the actions and resources required to deliver the 11 Gold and 10 Silver priorities identified in Section 1.2 (Table of Programme Activities) and lists Bronze priority actions.

Partnership Priorities

Project P1: Co-ordinate the Production of the Northumberland Area Tourism Management Plan (ATMaP)
Lead Agency: Northumberland Tourism
Timescale: 2009
Detail: This Area Tourism Management Plan is a reformatted and updated version of the ATMaP covering the period 2006 – 2009. The next major review will be for the 2010-1013 version produced during 2009. Northumberland Tourism will lead the review and production of the ATMaP, engaging all partners and stakeholders in the process to ensure their commitment to the ATMaP's objectives and their role in delivery.
ATP Resource Implications: Core responsibility of Northumberland Tourism
Objective: Corporate and unrelated to achievement of any single objective

Project P2: Regularly Review Northumberland's Strategic Objectives for Tourism
Lead Agency: Northumberland Tourism
Timescale: 2009
Detail: The production of the 2010-2013 ATMaP is likely to be the first appropriate point to review all of Northumberland's strategic objectives for tourism, unless there are major unanticipated events.
ATP Resource Implications: Core responsibility of Northumberland Tourism
Objective: Corporate and unrelated to achievement of any single objective

Project P3: Influence major Regional Tourism Strategy Documents and Plans
Lead Agency: Northumberland Tourism
Timescale: 2006- 2009
Detail: Through participation in the regional Network Management Group and other Network Groups Northumberland Tourism will ensure the interests of tourism in Northumberland are recognised in regional strategies and plans.
ATP Resource Implications: Core responsibility of Northumberland Tourism's Director and staff
Objective: Corporate and unrelated to achievement of any single objective

Project P4: Supporting and Developing Local Tourism Associations and Networks
Lead Agency: Northumberland Tourism with Tourism Associations
Timescale: Ongoing but with reduced activity after year 1
Detail: Northumberland Tourism will support a range of initiatives to involve local private sector tourism associations and networks in its aims and activities. This work will include a registration scheme for Tourism Associations, attendance at meetings of all registered Tourism Associations (at least once a year), organising a Tourism Association Chairman's forum at least twice a year, and helping to create new associations (where needed - including South East Northumberland).
ATP Resource Implications: Core responsibility of Northumberland Tourism
Objective: Unrelated to achievement of any single objective

Project P5: Consultation and Involvement of all Stakeholders
Lead Agency: Northumberland Tourism and partners
Timescale: Ongoing (2006-2009)
Detail: The ATP will consult widely with all partner organisations and business representatives to agree priorities and actions on an ongoing basis. The key task will be the creation of a Northumberland Tourism Forum to meet twice a year, including elected Member representation from partner Local Authorities and an open invitation to all registered businesses to attend. There will also be a regular news bulletin for partners and a members section of the ATP website with the opportunity to comment on current proposals.
ATP Resource Implications: Core responsibility of Northumberland Tourism
Objective: Corporate and unrelated to achievement of any single objective

Project P6: Operate a free Tourism Business Registration Scheme
Lead Agency: Northumberland Tourism and the private sector
Timescale: Ongoing (2006-2009)
Detail: Northumberland Tourism will operate a simple free registration scheme for all businesses which it will use to communicate with businesses.
ATP Resource Implications: Core responsibility of Northumberland Tourism
Objective: Corporate and unrelated to achievement of any single objective

Project P7: Create and Facilitate Appropriate Working Groups to advise Northumberland Tourism
Lead Agency: Northumberland Tourism and partners
Timescale: Ongoing (2006-2009)
Detail: Working groups will be created to bring together expertise and act as a sounding board for Northumberland Tourism.
ATP Resource Implications: Core responsibility of Northumberland Tourism
Objective: Corporate and unrelated to achievement of any single objective

Project P8: Regional and National Networking: Representing Northumberland
Lead Agency: Northumberland Tourism
Timescale: Ongoing (2006-2009)
Detail: Northumberland Tourism will develop channels of communication with the tourism industry to assist effective communication at regional and national levels. It will be a core responsibility to represent the views of Northumberland tourism businesses and partner organisations at a regional level (especially with One NorthEast), at a national level (especially with VisitBritain) and with neighbouring ATPs in Tyne & Wear, Co Durham, Cumbria and the Scottish Borders. This role is closely linked with Northumberland Tourism's duty to consult businesses and partners in order to agree its own priorities (See Project P5).
ATP Resource Implications: Core responsibility of Northumberland Tourism and associates
Objective: Corporate and unrelated to achievement of any single objective

Project P9: Support One NorthEast with relevant data and influence commissioning of visitor surveys
Lead Agency: One NorthEast with support from Northumberland Tourism
Timescale: Ongoing (2006-2009)
Detail: There is widespread agreement to the need for an annual analysis of the volume and value of tourism to Northumberland (STEAM) and for regular visitor satisfaction surveys. Accurate volume and value assessments will require monthly accommodation occupancy surveys involving all sectors, surveys on visitor spend patterns and visits to friends and relatives and regular reviews of the visitor numbers to attractions and Tourist Information Centres. This research will be led by One

NorthEast with Northumberland Tourism promoting participation and identifying gaps and means of filling them (e.g. monthly visits to attractions).
ATP Resource Implications: Reference the ATP Business Plan
Objective: Central to defining targets on most objectives

Project P10: Undertake a Medium-term Projection of Visitor Trends to the County
Project P 11: Co-ordinate the Collection of Key Data for Evaluation Purposes
Project P 12: Commission Research to Understand Resident's Views of Tourism
Lead Agency: Northumberland Tourism
Timescale: When resources allow
Detail: To be developed
ATP Resource Implications: Met as integral part of operational activity
Objective: Corporate and unrelated to achievement of any single objective

Gold Priorities

Project G1: UK Destination Marketing
Lead Agency: Northumberland Tourism and One NorthEast with tourism businesses and LAs
Timescale: New set of activities required every year (2006-2009)
Detail: Northumberland Tourism, independently and via One NorthEast will undertake a wide range of destination marketing activities for Northumberland (where relevant working across boundaries) aimed at key UK target markets, including developing and championing a consumer brand for Northumberland, a main accommodation guide and website together with press and PR activity including journalist familiarisation visits. Additional related activities are likely to include market research, advertising, direct mail, e-mail campaigns and attendance at exhibitions.
ATP Resource Implications: Reference the ATP Business Plan
Objective: Will impact on objectives 1, 2, and 3

Project G2: Low Season Marketing Campaigns
Lead Agency: Northumberland Tourism and One NorthEast with tourism businesses
Timescale: New campaigns required every year (2006-2009)
Detail: Northumberland Tourism, independently and via One NorthEast, will undertake specific marketing and media campaigns (including advertising, direct mail and web-based and e-mail campaigns) to promote low season visits from October – Easter. Campaigns will be directly linked to other low season activities, especially the development of new events (Project G10).
ATP Resource Implications: Included within the ATP Marketing budget (G1)
Objective: To impact primarily on objective 3, and in addition objective 1

Project G3: International Marketing
Lead Agency: One NorthEast / England's North Country with support from the ATP
Timescale: New set of activities required every year (2006-2009)
Detail: The marketing of Northumberland as a major holiday destination within England's North Country to key international markets will be led by the One NorthEast International Tourism Marketing Office working with England's North Country (ENC). The ATP will assist these agencies, including with advice and information on facilities likely to attract overseas visitors, photography and attendance at exhibitions.
ATP Resource Implications: Included within ONE Marketing budget (G1)
Objective: To impact on objective 1

Project G4: Regional e-Business Platform
Lead Agency: One NorthEast with support from Northumberland Tourism
Timescale: Ongoing (2006-2009)
Detail: Northumberland Tourism will continue to support the development of the comprehensive ICT-based regional e-business platform Destin-e. The ATP and its partners will use the system to supply data and information to Northumberland TICs, websites, kiosks, businesses and Customer Relationship Management (CRM) systems, website and e-marketing activity. Northumberland Tourism will be required to undertake major data collection responsibilities, and to explain the Destination Management System (DMS) to businesses and stakeholders, including by facilitating appropriate training.
ATP Resource Implications: Costs will be met by ONE and included within the ATP Marketing budget (G1)
Objective: To impact on objective 1, and via roll-out to businesses objective 8

Project G5: Improving and Developing our Cycle and Walking Routes
Lead Agency: Local Authority and Northumberland Tourism with National Park and Tourism Partnerships, cycle groups / specialists, AONB Partnerships, Hadrian's Wall Heritage
Timescale: New programme of activities required every year (2006-2009)
Detail: The LA will continue to have primary responsibility for ensuring that the county's Rights of Way network is well maintained and signposted, supported by Northumberland National Park Authority and local tourism partnerships, including the AONB Partnerships. The ATP will have a role in identifying priorities, and in partnership with other agencies managing the visitor experience on long distance cycle and walking routes.
ATP Resource Implications:
Objective: To impact primarily on objective 7, and in addition objective 9

Project G6: Magnet Attraction Projects
Lead Agency: Hadrian's Wall Heritage, LAs, attraction operators
Timescale: Ongoing (2006-2009)
Detail: The ATMaP recognises the importance of the county's magnet attractions to draw visitors to the County who can then be encouraged to explore other attractions and less well known areas. Current magnet attraction projects include the capital development programme on Hadrian's Wall (to be delivered through Hadrian's Wall Heritage, the successor body to the Hadrian's Wall Tourism Partnership), and at The Alnwick Garden by The Alnwick Garden Trust, and the Woodhorn Museum and County Archives. Kielder's development programme, Kielder Water and Forest Park, is an ambitious route to furthering the value tourism brings to inland Northumberland. The Northumberland Tourism Director and staff will have a core responsibility to advise potential funders on the strategic implications of major capital projects and to identify and encourage new magnet attraction projects to be developed in the future. This role is closely linked to the ATP's parallel role to encourage improvements and developments at existing attractions (Project G7) and supporting the creation of new sustainable attractions which will help fill a recognised product gap (Project G8).
ATP Resource Implications: Core responsibility of Northumberland Tourism
Objective: To impact primarily on objective 3 and 4, and in addition objectives 9, 1, 2 and 6

Project G7: Improvements and Developments at Existing Tourist Attractions
Lead Agency: Northumberland Tourism and Attraction Operators
Timescale: Ongoing (2006-2009)
Detail: Northumberland Tourism will support quality improvements at existing tourist attractions especially through its core responsibility to advise potential funders on the

strategic implications of major capital projects. The ATP will also continue a programme to improve the take-up of quality inspections at attractions through the national VAQAS scheme and will research the barriers to be overcome in order to encourage increased winter opening at attractions.
ATP Resource Implications: Included within the core ATP budget
Objective: To impact on objectives 3, 7, 4 and 9

Project G8: Support the Creation of New, Sustainable Tourist Attractions
Lead Agency: Northumberland Tourism and Attraction Operators
Timescale: Ongoing (2006-2009)
Detail: Northumberland Tourism will identify potential market gaps and opportunities for new visitor attractions and disseminate market intelligence. It will advise potential funders on the market potential, sustainability and strategic implications of any funding applications for new visitor attractions, eg the Berwick Granaries project is supported given its importance to town centre regeneration and the creation of critical mass.
ATP Resource Implications: Included within the core ATP budget
Objective: To impact on objectives 1, 2 and 4

Project G9: Improving Our Food Offer
Lead Agency: Northumberland Tourism and One NorthEast with hotels, restaurants, Made in Northumberland and the NSP
Timescale: 2007-2012
Detail: Visitor Satisfaction Surveys have revealed a relatively low level of visitor satisfaction with the county's food offer. This could be improved by more appropriate opening hours (better suited to visitor needs), improved quality and menu planning, and more use of local food and drink. One NorthEast with Northumbrian Larder are addressing many of the issues around improving the distribution and promotion of local food. This is complemented by Northumberland Tourism employing a food adviser to work directly with hotels and restaurants to demonstrate techniques and offer menu advice that will increase business profitability and increase quality.
ATP Resource Implications: Made in Northumberland and Market Town Welcome project budgets, RDPE
Objective: To impact primarily on objectives 9, 6 and 8

Project G10: Support Annual Festivals and Events Programme
Lead Agency: Northumberland Tourism with Event Organisers
Timescale: Ongoing (2006-2009)
Detail: Many existing festivals and tourist events are run by voluntary organisations with some support (including support in kind) from Local Authorities. Some Councils also directly run events and have a range of equipment (such as staging) which can be loaned to event organisers. In addition, the NSP is committed to working with the Newcastle Gateshead Initiative to deliver an annual programme of Culture[10] events in Northumberland. Northumberland Tourism will work closely with the NSP and their contracted event organisers to ensure the programme delivers ATMaP targets, particularly delivering low season business, and to market the events. Opportunities to provide expert assistance to event organisers, co-ordinate equipment hire or loan, and negotiate beneficial rates on insurance and other services will be sought.
Indicative ATP Resource Implications: Included within destination marketing budget G8
Objective: To impact primarily on objective 3, and in addition objectives 9, and 1

Project G11: Improving our Retail Offer
Lead Agency: Northumberland Tourism with the private sector, Market Town Partnerships, Business Link, Aurora and Made in Northumberland.

Timescale: 2006-2009
Detail: Northumberland Tourism will have a responsibility to work with other agencies including the Market Town Partnerships and Business Link to engage the private sector in improving the County's retail offer for visitors. A regional Retail Distinctiveness Study has identified effective programmes using best practise from elsewhere in the country. The Market Town Welcome programme has stemmed from this work to identify and deliver specific activities. Improvements are needed to provide a 7-day retail offer for visitors with a wider range of higher quality products, especially products that are made in Northumberland.
ATP Resource Implications: MiN and MTW project budgets
Objective: To impact on objectives 9, 6 and 8

Silver Priorities

Project S1: Cross boundary working
Lead Agency: Northumberland Tourism with Cumbria, Co Durham, Tyne & Wear, Scottish Borders
Timescale: Ongoing
Detail: Ensure visitor information and marketing activities represent the tourism product across authority boundaries.
ATP Resource Implications: Met as integral part of operational activity.
Objective: Corporate and unrelated to achievement of any single objective.

Project S2: Improving the Visitor Contact Network
Lead Agency: One NorthEast and Northumberland Tourism with District Councils, National Park and Otterburn Mill
Timescale: Ongoing (2006-2009)
Detail: From early 2007 ONE NorthEast will introduce and operate new arrangements for networking Tourist Information Centres across the region. Benefits will include common standards, improved branding, literature distribution services, ICT networking services, uniforms, staff training and a reserve pool of staff. Only TICs that are part of the Tourism Network will be eligible for benefits. The precise ATP role in TIC networks requires further clarification but is likely to include setting clear standards for presenting the Northumberland brand, and supporting TICs in their use of Desti.ne.
ATP Resource Implications: Included within the ATP and LA Marketing budget.
Objective: Will impact on objective 9

Project S3: Adoption of Northumberland brand
Lead Agency: Northumberland Tourism
Timescale: Ongoing
Detail: Encourage all businesses and public agencies to use the Northumberland brand in their promotion to ensure a consistent look and feel.
ATP Resource Implications: Met as integral part of operational activity
Objective: Corporate and unrelated to achievement of any single objective

Project S4: Outdoor Activities – Product Development
Lead Agency: Northumberland Tourism with Business and Community Partnerships
Timescale: Initial scoping study required to determine future activities
Detail: In addition to cycling and walking (Project G5), Northumberland Tourism will help to identify product development gaps and opportunities for a wide range of other outdoor and nature-based tourism activities, some of which may involve community-based provision and where relevant working across boundaries. This could include the provision of countryside and wildlife interpretation panels, signed trails, nature

hides, joint ticketing of golf courses and improved facilities for fishing, shooting, horse riding, wildlife watching, geotourism and water sports. Northumberland Tourism will support these activities through research and advice on best practise and promotion, working with the Tourism Network North East's Product Development Officer's Group.
ATP Resource Implications: Included within the core ATP budget
Objective: To impact on objectives 1, 2, 3, and 9

Priority S5: Supporting Accommodation Quality
Lead Agency: Northumberland Tourism with One NorthEast and accommodation businesses and associations
Timescale: Ongoing (2006-2008)
Detail: Northumberland Tourism and One NorthEast will encourage more businesses to participate in national quality inspection schemes and only allow inspected properties to be included in its marketing campaigns. The ATP with ONE will also take active steps to organise events and workshops to explain the benefits of participation in the national quality inspection schemes and to encourage improvements in quality, in partnership with other agencies including Business Link.
ATP Resource Implications: Core responsibility of Northumberland Tourism
Objective: To impact primarily on objective 7, and in addition objective 9

Project S6: Tourism Skills Training & Business Support
Lead Agency: Northumberland Tourism with training providers, Business Link, businesses and ONE
Timescale: Ongoing
Detail: The Regional Tourism Workforce Development Plan, published by ONE in 2005, sets out the priorities for skills training in the tourism industry amongst the existing and potential future workforce. The delivery of appropriate training and business support will be undertaken by the Northumberland College Tourism Centre of Vocational Excellence (CoVE), Business Link and other training providers, co-ordinated by One NorthEast and financially supported by the Learning and Skills Council. Northumberland Tourism will have a specific role to continue to work with its registered businesses to identify the need for specific training, especially short courses and to promote the take up of training amongst businesses. The Northumberland Tourism Workforce and Business Development Plan and a Tourism Skills Audit, published by the NSP in 2005, will assist this process.
ATP Resource Implications: Core responsibility of Northumberland Tourism
Objective: To impact primarily on objective 8, and in addition objectives 4 and 9

Project S7: 'Green' Business Accreditation Scheme
Lead Agency: One NorthEast with Northumberland Tourism and the National Park
Timescale: Ongoing
Detail: Northumberland Tourism will (subject to consideration of accreditation scheme benefits) create incentives to encourage businesses to take up the green tourism agenda including through a 'Green' Business Accreditation and Advice Scheme. The scheme will help businesses with the implementation of a wide range of profitable projects including energy efficiency, improved re-cycling, greater use of local suppliers and local environmental improvements. Northumberland Tourism and the TICs should aim for accreditation under the scheme. As part of this project, Northumberland Tourism will lobby councils to improve their waste collection and recycling provision for businesses.
ATP Resource Implications: Included within the ATP business and workforce development budget
Objective: Sustainable tourism is at the heart of Northumberland Tourism's agenda. No impact on any specific objective.

Project S8: Public Transport Provision for Visitors
Lead Agency: Local Authority, supported by Northumberland Tourism
Timescale: Ongoing (2006-2009)
Detail: The LA will work with public transport providers to improve the links to tourist attractions, improve linkages between services (especially the links between bus and train services) and provide and promote new interchanges and gateways to improve access to the countryside by public transport. Northumberland Tourism will have a specific responsibility to lobby on behalf of the tourism industry and to identify priorities for inclusion in the Local Transport Plan. Work with public transport providers that will encourage greater use of public transport for tourist visits
ATP Resource Implications: LA and ATP core responsibility
Objective: To impact on objective 9

Project S9: Maintaining and Developing our Protected Landscape Areas
Lead Agency: Northumberland National Park Authority, the AONB Partnerships for the Northumberland Coast and North Pennines and Hadrian's Wall Heritage.
Timescale: Ongoing
Detail: The Northumberland ATMaP identifies a high priority need to continue to develop Northumberland's protected landscape areas (National Park, Coast AONB, North Pennines AONB and Hadrian's Wall World Heritage Site) as important visitor destinations through appropriate sustainable tourism projects, as identified in their own ATMaPs. This is recognition of the importance of Northumberland's high quality environment in its tourism offer and a clear acknowledgement that the ATMaPs must always take precedence in the consideration of new tourism proposals and activities.
ATP Resource Implications: Core responsibility of partners. Networking with key landscape organisations will be a core responsibility of the ATP Director and staff
Objective: Corporate and unrelated to achievement of any single objective

Bronze Priorities

Whilst these projects will not be given the same priority as the Gold and Silver projects (especially in terms of resources), there will be a expectation that Northumberland Tourism and its partners will achieve progress on most, if not all of the following project areas:

Project B1: Travel Trade Marketing

Project B2: Improve the Training Provision for TIC Staff

Project B3: Publish a wide range of detailed Local Information for Visitors

Project B4: Promote the National ‘Walkers & Cycling Friendly’ Scheme

Project B5: Ensure the Cross-Promotion of Attractions

Project B6: Organise Familiarisation Visits to Attractions for TICs and Businesses

Project B7: Improve the Provision of Facilities for Visitors with Special Needs

Project B8: Maintain a Sites and Premises Register for New Tourist Accommodation

Project B9: Provide specialist ‘Customer Care’ Training for Businesses

Project B10: Identify Major Skills Gaps and Collect Relevant Workforce Data

Project B11: Improve the Links between Businesses and TICs

Appendix C: Range of partners involved in the delivery of the ATMaP

The following are examples of some of the organisations involved in helping to set and deliver towards Northumberland's ATMaP:

- Northumberland Tourism
- One NorthEast
- The Northumberland Strategic Partnership
- Local private sector Tourism Associations
- Individual businesses and organisations within the visitor economy including English Heritage and National Trust
- The Northumberland Local Authorities, including Councils and Northumberland National Park Authority
- Hadrian's Wall Heritage, the successor body to the Hadrian's Wall Tourism Partnership
- The Kielder Partnership
- Business Link for Northumberland
- Northumberland Learning and Skills Council, Northumberland College (Tourism CoVE) and other training providers
- The North East Chamber of Commerce
- North Pennines Area of Outstanding Natural Beauty
- Northumberland Coast Area of Outstanding Natural Beauty
- Leader Area Partnerships (Coast & Lowlands, Uplands, North Pennines)
- Market Town Welcome Partnership (including development trusts, town partnerships, etc)
- Made In Northumberland Partnership (including local businesses, food groups, food festival organisers, etc)

Appendix D: Membership of the ATP Task Force and Working Group (2005)

The following individuals have attended at least one ATP Task Force or Working Group meeting between February and September 2005.

The Co-ordination Team

John Litherland / Jane Blackburn	Northumberland Strategic Partnership
Lorna Easton / Graham Nicholson	TEAM (Consultants)
Louise Davis / Chris Little	One NorthEast
Kevin Kaley	Tourism UK
Peter Kemp	Independent Consultant

Private Sector Representatives

Andrew Sugden / Rachel Spence	North East Chamber of Commerce
Carole Ann Field	Regional Tourism Advisory Board / Beach Court
Euan Pringle	Kielder & Redesdale Tourism Assoc / Otterburn Mill
Bruce Hewison	Alnwick Tourism Association / West Acre Guest House
Derek Smibert	North Northumberland Tourism Association
Patricia Birley / Fiona Watson	Vindolanda Trust
Lesley Williamson	Longhirst Hall Hotel and Conference Centre
David Hunter	Matfen Hall Country House Hotel
Elaine Lang	Tillmouth Park Hotel / NNTA
Elisabeth Smith / John Lovett	The Alnwick Garden
Bernard Bloodworth	Linden Hall Hotel
Colin Earnshaw	Mid Tyne Community Trust

Public Sector Representatives

Paul Hemphill	Northumberland County Council
Maria Manion	Alnwick District Council
Shona Alexander	Berwick-upon-Tweed Borough Council
Nigel Walsh / Mark Robinson	Blyth Valley Borough Council
Zoe Bottrell	Castle Morpeth Borough Council
Lynn Turner	Tynedale Council
Colin Mitchell	Wansbeck District Council
Duncan Wise	Northumberland National Park
Jane Brantom	Hadrian’s Wall Tourism Partnership
Kevin Taylor	Business Link for Northumberland
Claire Colgan	South East Northumberland North Tyneside Initiative

Appendix E: The VICE model: Visitors, Inudstry, Communities & Environment

Sustainable tourism has been defined as tourism which:

Welcomes, involves and satisfies…	**V**isitors
Achieves a profitable and prosperous…	**I**ndustry
Engages and benefits the host…	**C**ommunity
Protects and enhances the local…	**E**nvironment

There is general agreement amongst partners that adopting the following general principles will help to embed a truly sustainable tourism industry in Northumberland:

- Core to the success of the Northumberland Area Tourism Management Plan (ATMaP) will be the inclusion of measurable objectives to cover all aspects of the sustainability agenda.
- Regular research / monitoring is required to set baselines and to determine whether or not objectives are being met, not least so that corrective actions can be taken.
- It will be preferable if businesses, communities and organisations can be encouraged by reward to follow a 'Green Route', rather than penalised for ignoring it. There is a need for research to demonstrate how sustainable tourism principles can bring short and medium term financial benefits to individual businesses and organisations, as well as altruistic or long term benefits to the community and region as a whole.
- All significant projects should be assessed for their sustainability and environmental impact, including the creation of the ATP itself. The existing Integrated Regional Framework (IRF), compiled by the Regional Assembly provides the basis to determine the sustainability of all proposed plans, policies and investments. This should be complimented by reference to appropriate locally derived sustainability objectives where these exist.
- The consideration of local sustainability issues should be integral to all assessments. In particular, it should be imperative to consider the negative sustainability impacts of projects (including in relation to local quality of life) or the opportunities to enhance positive sustainability impacts at all scales. More visitors may be very welcome if they are spending more. However if this means that more car parking spaces are required, more toilets, better roads, or that great strains are placed on local health services and policing, the costs can outweigh the benefits.
- All sustainability assessors should receive appropriate training, as currently provided by One NorthEast.
- Once established, the ATP should consider applying for appropriate environmental designation / accreditation status such as the European Charter for Sustainable Tourism in Protected Areas.
- No new organisations or networks should be created where an existing organisation or network is willing, and could reasonably be expected, to undertake particular required plans and actions; and no new registration schemes or activities should be started where an appropriate county, regional or national alternative already exists or is planned.

Appendix F: The Structure of the Northumberland Tourism Industry

Tourism in Northumberland is, for the most part, made up of a large number of very small companies, many employing 5 or less people. In Northumberland, there are over 1500 tourist accommodation and attraction businesses. However, it also demonstrates great scope in its multiplier effect. Pubs, restaurants, cinemas, shops, petrol stations, public transport, artists, craft makers and galleries are some of the more obvious beneficiaries of tourism, but it also brings in substantial business to many other sectors of the economy from food and drink to building services, printers, accountants and solicitors.

The following analysis is based on data as at November 2008:

HOTELS AND SERVICED ACCOMMODATION

According to the Desti.ne database, there were 322 quality assessed serviced accommodation establishments in Northumberland in November 2007. In November 2008, there are 336 – an increase of 4%.

There are 43 hotels, and the remainder are guest houses, B&Bs, pubs or inns with rooms and farmhouses. Most of these would be more correctly classed as micro-businesses rather than SMEs, having less than 5 people (including the owners) on the payroll.

Of the hotels, the chains represented include Macdonald Hotels, Classic Lodges, Premier Lodges and De Vere. All the rest are privately run.

5 hotels have less than 10 rooms, 21 are between 10 and 20 rooms, 8 are between 20 and 40 rooms, but only 8 have over 40 rooms. Only 1 has over 100 rooms.

Because of the stricter way in which hotel accommodation is assessed, guest houses and B&Bs appear to have a higher average quality rating than the hotel stock. There are no 5 star hotels in the county. Of all Northumberland's 336 serviced accommodation products, 28 are 2 star; 81 are 3 star; 187 are 4 star; 31 are 5 star, 3 are assessed as 'budget hotels' and 6 are currently awaiting grading.

In addition to these quality assessed businesses, the Desti.ne database indicates that there are a further 144 non-assessed serviced establishments that we currently know of. Many of these are either small, pub-based or may have previously been assessed but have since lapsed: Northumberland Tourism continues to have a dialogue with these businesses, to encourage them to join the assessment scheme. Additionally, new businesses who have been added to the database as 'skeleton records' (prior to applying for grading) will temporarily appear in this section.

SELF CATERING AND CARAVAN & CAMPING

On the self-catering side, there were 584 quality assessed establishments on the Desti.ne database in November 2007. 158 of these properties were managed and marketed by national booking agencies (eg Holiday Cottages Group, Sykes Cottages) and 50 by local / regional agencies (eg Cumbrian Cottages; Northumberland Cottages). That leaves a nett stock of 376 owner managed properties.

In November 2008, the total number of self-catering establishments has reduced to 518. However, now only 25 of these properties are managed and marketed by national booking agencies and 80 by local / regional agencies. That leaves a nett stock of 413 owner managed properties, an increase in real terms of 10%.

Of the 518 properties, 16 establishments are bunk barns, camping barns or hostels; 39 are camping & caravanning sites and the remainder (463) are conventional self-catering cottages, houses or lodges.

Of these 463 self-catering establishments, 344 are single unit businesses. 79 owners have 2 to 3 units; 32 have between 4 and 10 units; 6 have between 11 and 20 units. 2 establishments, Kielder Lodges (Northumbria Water) and Micklewood Park (Longhirst Hall) own and operate more than 30 units.

58 of these are 5 star; others (multiple unit sites) have variable gradings: 250 are between 4 and 5 star; 124 between 3 and 4 star; 9 between 2 and 4 star. The majority are our self catering stock is therefore of a very high standard.

The Desti.ne database shows a further 410 establishments that are not quality assessed. Of these, nearly 200 are agency managed and marketed, leaving around 200 owner-managed properties that are not assessed.

There is a very large caravan and camping sector in Northumberland. There are 39 quality assessed sites. Several of these are very large holiday parks – the two largest being Haggerston Castle and the Berwick Holiday Centre with over 1800 berths and pitches. Both of these are part of the Bourne Leisure Group. The other major players in this sector include Park Resorts, The Caravan Club and The Camping and Caravanning Club.

In total, there are over 11,500 individual ‘pitches’ across the county, including camping berths, caravan berths and static mobile homes. Many of these mobile homes are owned by individuals who live in the within a 2-hour drive, and some may be sub-let to casual visiting holidaymakers by the owners of the caravans. Research estimates that caravan owners each put around £3700 into the local economy every year.

The majority of these sites are good quality and are graded between 3 and 4 star, although 7 exceptional sites are graded at 5 star. The Desti.ne database shows there are a further 16 non-assessed camping and caravanning parks within the county.

Finally, there are 13 dormitory-style quality assessed Hostel Accommodation. This sector is dominated by the Youth Hostels Association.

TOURIST ATTRACTIONS

There are approximately 145 tourist attractions in the county excluding major retail establishments, open countryside areas and beaches. 90% of the attractions are associated with either the history of Northumberland (castles, Roman forts, museums, Christian heritage, country houses, etc) or its coast and countryside (including parks, gardens, bird and wildlife attractions). The only other significant grouping of attractions is associated with arts, crafts and local produce.

The major attractions are dominated by those owned by English Heritage and the National Trust.

Of the twelve most visited attractions that charge admission, 5 are managed by English Heritage (Housesteads, Belsay, Chesters, Lindisfarne Priory and Warkworth Castle), 3 are managed by the National Trust (Cragside, Wallington and Lindisfarne Castle), and only 4 are independent (Alnwick Garden, Bamburgh Castle, Alnwick Castle and Vindolanda).

OTHER

Over the past year, other data has been collected on the Desti.ne database, including records for Activity Operators (106 products); Tour Operators (10 products); Entertainment (8 products); Eating Out (162 products); and Shopping (141 products).

This list is by no means exhaustive and is being added to constantly, allowing Northumberland Tourism to make judgements in future about the performance and growth in these areas.

Appendix G: UK and International Target Markets

In recent years Northumberland's major target markets were identified through a series of market research projects. Market segments were identified by the previous VisitBritain model of socio-economic groupings. These findings are outlined in paragraph A.

In 2006 Northumberland Tourism led a working group which mapped market segments using the Ark model. The Ark model is the current method by which target audiences are grouped by VisitBritain and One NorthEast. This same working group concluded both an interim brand for Northumberland and additional market segmentation activity for 2007. These findings are outlined in paragraph B.

A Market Segmentation by socio-economic and geographical groupings

<u>UK Market Segments</u>

The principle of market segmentation is to identify those consumer groups that will provide the best return on investment, ie the groups towards which marketing initiatives are most likely to yield good results. Not surprisingly, there is a close correlation between the key target markets that have been identified and the existing visitors to the County. Research established that the key target markets that all future Northumberland marketing campaigns should be aimed at are:

- The Older Traditionalist: Including 'Ski Brogues' – Age 50+, affluent couples, probably retired former professionals or wealthy business people
- 'New Empty Nesters' – Age 40-65, suburban couples, free of children, who both work in middle to senior posts
- 'Suburban BC1's' – Age 45-65, couples nearing the end of their employment, up to middle management
- The Upmarket Alternatives: Age 25-54, couples who tend to choose an 'alternative' way of life including holidays off the beaten track, alternative medicines, vegetarian and / or organic food, etc – including families
- A secondary target market – 'Younger Experience Seekers' has been identified as a useful additional target for activity breaks such as cycling and walking (including day visits), rather than main holidays.

Geographically, Northumberland has tended to be most successful in attracting visitors from Yorkshire (especially the city areas of south and west Yorkshire), Manchester and Cheshire. Its next most important markets are the UK Midlands and the North East region (especially Tyneside). Visitor numbers from the south of England are less high but have been growing faster than from the rest of the country in recent years, with the exception of Greater London where interest has remained relatively low. Similarly, Northumberland does not tend to attract large numbers of visitors from Scotland or Wales, except for Scottish visitors to the large Holiday Parks in the north of the county.

<u>Overseas Markets</u>

Market segmentation reviews have concluded that it would not be cost effective for Northumberland to promote to any overseas markets in isolation. However, it is recommended that overseas marketing is undertaken in association with the England's North Country Consortium / One NorthEast.

Evidence from Tourist Information Centres in the county suggests that very few overseas visitors regard Northumberland as being a sole destination in its own right. At a minimum, a visit to Northumberland (including overnight stays) will be combined with a visit to Newcastle/Gateshead, especially for shopping and nightlife. But it is equally common for visits to Northumberland to be combined with visits to other parts of the North of England (eg York or the Lake District), or other parts of England (especially London) and Scotland. As a rule of thumb the greater the distance travelled to get to an overseas holiday destination, the larger the area that is likely to be visited during the holiday.

2006 figures indicate that the current Top 10 countries of origin of international visitors to the North East region are: Norway (14% of all overseas visitors); Germany (11%); USA (8%); Netherlands (8%); Ireland (7%); Spain (7%); France (6%); Australia (4%); Canada (3%); and Belgium (3%). Anecdotally, although Norway is the most important international market for the North East as on a whole, younger Scandinavian visitors appear to be primarily attracted to the shops and nightlife of Tyneside rather than the scenery and heritage attractions of Northumberland. In contrast, the Dutch are often very attracted to Northumberland – especially for its cycling and walking opportunities.

The Hadrian's Wall Tourism Partnership has identified Germany as another important European target market, centred on visits to the main Roman sites.

B Ark Model Segmentation

The following Ark model market segments are Northumberland's targets, pending more detailed analysis of visitors in 2007.

Functionals – Self reliant low spenders, value functionality, arts & culture important
Traditionals – Value good service, unlikely to pay extra, relaxed lifestyle, enjoy intellectual challenges
Cosmopolitans – Do what they want, try new things, willing to pay for more, service important
Discoverers – Independent of mind, style not important, quite high spend but value important

Marketing activity will 'look after' the more numerous, price sensitive Traditionals and Functionals, but be increasingly geared towards stimulating visits from the higher spend Cosmopolitans and Discoverers.

The most current market segmentation analysis and research is available on the regularly updated North East Tourism Business Toolkit at:
http://www.tourismnortheast.co.uk/site/research-and-statistics

Appendix H: Major Capital Investments in Progress

This appendix refers only to current (2008) or imminent high level projects identified that are, or will, significantly raise Northumberland's offer and profile. These and other capital projects relating to attractions are extracted from the NSP's continually evolving investment monitoring process which acts as an up-to-date and dynamic external appendix – identifying project prioritisation for Northumberland Tourism.

PROJECT NAME	Proposer	Project Description	CURRENT (Oct 2008) PROFILE: 2008-2012					
			START DATE	FINISH DATE	LIFETIME			
					SP Capital	Other Public	Other Private	Total
Vindolanda - Hadrians Wall Central	Vindolanda Trust	Construction of an archaeological study centre supported by a volunteer programme and the creation of new exhibition space to house the Roman Writing Tablets.	May 2009	March 2011	1,815,000	3,977,972	402,944	**6,195,916**
Housesteads - Hadrians Wall Central	National Trust	Enhancement of visitor facilities, access and interpretation at the Housesteads site.	April 2009	March 2012	1,830,000	2,500,000	500,000	**4,830,000**
SILL - Hadrians Wall Central	Northumberland National Park Authority	Capital works to re-develop the site to create a discovery centre and improve facilities and provisions on the site including physical and intellectual access.	May 2009	March 2012	2,000,000	1,980,000	130,000	**4,110,000**
Kielder Big Picture Capital Programme	Kielder Partnership	Capital programme of works to transform Kielder Water and Forest Park into a premier destination.	Nov 2008	March 2012	6,045,000	3,950,000	10,005,000	**20,000,000**

Seaton Delaval Hall	National Trust	Acquisition and redevelopment of Seaton Delaval Hall.	April 2009	March 2012+	2,000,000	3,100,000	8,900,000	**14,000,000**
Hexham Abbey	Hexham Abbey	Development of Hexham Abbey Visitor 'Christian Heritage' Facilities.	April 2009	March 2011	1,000,000	1,308,466	2,664,786	**4,973,252**
Market Town Visitor Welcome - Capital Investment Programme	NSP - S Bevan	The project will continue the development of 6 Nland Mkt Towns as tourist destinations thro a capital investment prog	Sept 2008	March 2011	2,475,000	1,071,000	0	**3,546,000**
Northumberlandia at Blagdon	Blagdon Estate / HJ Banks	Ambitious landscape-scale artwork in SE Northumberland adjacent to the A1 with associated visitor services	tbc	tbc	0	0	2,000,000	**2,000,000**
Total					17,165,000	18,225,322	25,356,275	**60,746,597**

Please view attached file for a year-by-year break down of the above figures.