APPENDIX A

CONNOR & CO.

TOURISM MARKETING AND
DEVELOPMENT SERVICES

A Tourism Management Strategy for Derbyshire 2002 - 2007

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SECTION 1
THE INTRODUCTION

THE IMPORTANCE OF TOURISM

1.1 Tourism makes a vital contribution to the Derbyshire economy by generating income and employment. The most recent estimates in 1997/98 indicate there were 21.7 million visits to Derbyshire who spent a total of £524 million, supporting approximately 19,400 jobs.

1.2 Tourism is defined as a stay away from home for one or more nights for the purpose of holidays, business and conferences, visiting friends and relatives or educational trips. Day trips from home to tourist attractions, conferences, shopping and leisure centres which do not include overnight accommodation are not always included in statistics. However, for practical purposes, the strategy is concerned with visitors to Derbyshire in their widest sense and day trips are considered to be an integral part of the tourism sector.

1.3 "Derbyshire" is defined as the administrative area covering Amber Valley, Bolsover, Chesterfield, Erewash, Derby City, Derbyshire Dales, High Peak, North East Derbyshire and South Derbyshire. This includes a substantial part of the Peak District National Park.

1.4 The impact of tourism expenditure benefits the whole economy. Visitors to Derbyshire make use of a wide range of goods and services :

- Tourism businesses such as accommodation, visitor attractions, events and information centres.
- Leisure businesses such as pubs, restaurants, cinemas, theatres and sporting facilities.
- Transport facilities such as railways, bus and coach companies, car hire and petrol stations.
- The local infrastructure including heritage and cultural areas, shops, crafts, car and coach parks, community leisure facilities such as parks, and public conveniences.
- The natural environment including countryside and natural wildlife habitats, footpaths and cycle routes, and waterside environments.

1.5 The purpose of the management strategy is to :

- Plan ahead for the tourism sector to cover the next five years up to 2007.
- Work towards the longer vision for Derbyshire.
- Identify the strategic principles and action to be taken.
- Establish a tourism partnership structure and framework for delivery.
- Set a context for the annual business plans and local tourism strategies.
- Support the case for additional funding and resources for Derbyshire Tourism.

TOURISM MANAGEMENT IN DERBYSHIRE

1.6 This is a management strategy for the whole tourism sector in Derbyshire. The strategic management of tourism lies with the local authorities. A holistic approach to tourism is now being taken in the public sector. Tourism has important relationships to areas such as planning, economic regeneration, inward investment, traffic management, sustainability, cultural industries, skills and learning, and social inclusion. Tourism is therefore an important part of the joined-up approach advocated within local government.

1.7 However, tourism is not a statutory local authority function. Consequently the resources and scale of tourism activity varies across Derbyshire according to the nature of the product and local authority service priorities. Some authorities, but not all, have dedicated tourism units.

1.8 The local authorities are active in tourism in various ways :

- Operation of the Tourist Information Centre network and information services.
- Marketing, promotional activity and corporate web sites.
- Product development and infrastructure.
- Countryside management, rights of way, signposting and public transport.
- Research and evaluation.
- Operation of facilities such as country parks, museums, arts, culture, leisure and recreation facilities.

1.9 The main tourism partnership is the Derbyshire Tourism Officers' Group (DTOG) who came together over 10 years ago to fill a countywide gap in the coordination of marketing. The group is an informal partnership of Derbyshire local authorities and the Peak District National Park Authority, served by the tourism managers and other staff with tourism responsibilities, and the Heart of England Tourist Board. It has no political or private sector representation.

1.10 The group has been primarily involved in marketing activity but has taken a growing role in research, ICT and strategic issues. The main activities cover publications, public relations, press visits, UK advertising and direct mail, overseas promotion, group promotion and research. DTOG raises a joint annual budget from the constituent authorities of around £50,000 per year and generates additional income from the private sector. DTOG has no dedicated staff resources. The partnership is well established and highly effective. It is a structure to build on.

1.11 All of the DTOG partners recognise the need for an integrated approach to tourism marketing across Derbyshire. It is becoming apparent the partnership approach should be developed in activities beyond tourism marketing, research and ICT. There is a danger of a fragmented approach with poor communication in other aspects of tourism activity.

1.12 DTOG identified the need for and commissioned the tourism management strategy. However, the sector as a whole needs to be involved in the preparation process and take ownership. DTOG is an important partner well placed to develop and implement the tourism marketing activity within the management strategy.

1.13 Tourism partnerships are desirable which can develop and deliver initiatives that relate to tourism promotion, the business travel and conference sector, inward investment, infrastructure, product development, countryside management, public transport, business support and training, information services, research and ICT. This raises issues about resources, communication and accountability.

1.14 Consequently, the organisations that need to be involved in the strategic planning and management include the local authorities, the private sector and regional agencies. This includes :

- Derbyshire County Council, the Derbyshire Districts and Derby City Council.
- Local Government Association.
- Peak District National Park Authority and Peak District Rural Development Partnership.
- East Midlands Development Agency and Heart of England Tourist Board.
- Learning and Skills Council, Chambers and Business Links.
- University of Derby and Colleges.
- New local partnerships such as the National Heritage Corridor, the Coalfield Alliance and The National Forest Company.
- Conference Derbyshire.
- Private sector representation to cover hospitality, attractions, retail and transport sectors.
- Other local partnerships such as tourist associations and farm tourism groups.

SECTION 2
THE CONTEXT

TRENDS AND FORECASTS

2.1 There are many factors that will influence tourism in Derbyshire. This includes change in the lifestyle and aspirations of consumers, growth or contractions in key markets, competition and new innovation.

2.2 There are a number of political and economic factors which have a bearing on tourism :

- The tourism market can be exposed to crises in other economic sectors. This is reflected in the foot and mouth outbreak which devastated tourism and the rural economy in 2001. Recovery plans and additional funding for tourism promotion have been made available in some parts of the UK which will increase the scale of competition in 2002 and beyond. The terrorist attacks in North America on 11 September are likely to have a major and lasting impact on international travel and tourism. The combined impact of foot and mouth alongside 11 September, coupled with exchange rates is having a major adverse impact in the North American market.

- The UK economy is expected to experience slow yet sustained growth combined with low inflation and stable or falling unemployment. Consumers are having more discretionary income to potentially spend on leisure. Consumer savings have reached their lowest-level for 12 years and expenditure may tail off if savings start to build up.

- Despite the strong economic outlook, the continuing strength of sterling makes foreign destinations more appealing for UK residents. The European short break market has been opened up by budget airlines and long haul markets have grown in popularity for main holidays.

- The performance of overseas economies has a bearing on the UK. The projected downturn in the North American and Far Eastern economies is expected to influence the world economy and could dissuade overseas residents from long haul overseas holiday travel.

- The Government has set out commitment to regional development. The constantly evolving roles and responsibilities of local authorities and regional agencies means that issues such as collaboration, funding and accountability require greater attention. The introduction of the best value regime has consequences for local authorities in the delivery of tourism services. Government policy is addressing a number of areas that have a bearing on the tourism sector - licensing reform, access to the countryside, disability awareness, sustainability, etc.

- Increasing pressure for consumer protection in areas such as food standards and transport safety may result in more legislation and regulation, not less as intended.

2.3 Cultural trends have a bearing on tourism :

- Lack of time is a growing constraint to leisure and tourism. Consumers will consider value for time as important as value for money. Higher levels of stress are now being experienced leading to a propensity to take shorter but more frequent holiday breaks.

- Consumers will be searching out products that seem more individual and authentic, with growing awareness of environmental and ethical issues and cultural identities. This relates to the growing popularity of organic food, alternative healing remedies and greater ethnic and cultural diversity.

- There is a much greater awareness of environmental issues and substantial public interest in access to the countryside for leisure and recreation. Walking and cycling are major growth activities. The markets for these activities are becoming more sophisticated and segmented. Walking interests now range from short circular country walks to long distance routes over rugged terrain. There has been a growth in the number of specialist magazines covering walking, cycling and the great outdoors with the emergence of specialist holiday operators. National Parks are a natural magnet for many of these pursuits. Substantial improvements are being made to the national cycle route network.

- A new focus is emerging around nostalgia and roots. Many of the fashions over the last 30 years have become cyclical.

- There is strong demand amongst some market segments for well known quality brands yet there is generally low customer loyalty to holiday destinations.

- There has been an erosion of Sundays as a family day out to visitor attractions, created by the 7 day week, new out-of-town shopping centres, major sports events and other leisure pursuits. Many retail and service sector employees work at weekends.

- Eating out is rising in popularity stimulated by the choice and diversity of cuisine, interest in healthy living and eating, popularity of celebrity chefs and the emergence of branded restaurants and family theme pubs with restaurants and indoor play areas.

- People have growing awareness about health, fitness, dietary, allergy and beauty issues creating demand for active pursuits and leisure fitness club membership, soft adventure such as walking and cycling, beauty therapy, health farms and special dietary needs.

- There has been a boom in DIY and gardening pursuits as people seek to improve and expand their properties, competing for time and money with leisure activities.

- Tourists are looking for plenty to do, with interactive experiences becoming more important than passive ones.

2.4 The changing age profile of the population has implications :

- Moderate shifts in population will have an important impact in the next ten years. By 2010 it is predicted the number of younger people under 15 will fall by 7%, largely amongst the 5 to 9 year olds (one of the main school trip markets), young people age 20 to 29 will grow by 2%, 30 to 44 year olds will decline by 7%, the number of over 45's is set to increase by 17%, and there will be a 36% increase in the 60 to 64 age group.

- The growth of the aging population is an important phenomenon. By 2011 43% of the population will be aged 45 and over. The propensity of disability rises with the higher life expectancy. Consequently, the disabled market is likely to grow further.

- Older people in the future are likely to retain many of the core values they adopted in their earlier years. Tomorrow's older customers will not simply be like today's.

- Lifestage is an important influence on people's tourism decisions. The most significant influence is the presence or absence of children in the household. Families with younger children are the most likely to take main holidays in the UK. Couples who may be pre-family or post-family are the major short break markets for the UK. The post-family or empty nesters / early retired have the time, money and greatest freedom.

- The age that couples start families is rising and looks set to rise further. Older parents are likely to have different holiday expectations to younger parents.

- There has been a large rise in visits to friends and relatives reflecting the increasing trend for people to get together socially and the migratory nature of the population.

- School terms dictate the periods that are available for many people's main holiday. This may change. Proposals for six terms would have the impact of regionally staggering school holidays to prolong the season, move summer holidays forward when the weather is generally better and may give families a chance to take two week spring and autumn holidays.

2.5 The ICT revolution will continue to impact on tourism :

- The number of people worldwide using the web is expected to double from 350 million to 765 million in the next five years. There are more than 1.5 million tourism and travel web sites and this is expected to grow. The ease of finding sites, links between sites and credibility are key factors. There are new ways to access the web through digital TV and mobile phones. However, web access away from home on holiday is less readily available. Few TICs and accommodation establishments have web facilities for visitors.

- Local on-the-spot tourist information is still in high demand. Tourism is a service based industry and technology is not a replacement for personal service. Human contact remains critical.

- There is an e-government commitment in place and new regulations will start to have an impact on communication within the public sector for tourism.

- E-commerce is expected to rise in the UK from £2 billion in 1999 to £120 billion in 2009. An estimated 6 million people in the UK have now shopped online. E-mail is a common medium for business to business communication.

2.6 These trends and forecasts place Derbyshire in a strong position to potentially exploit:

- Continued growth in short and weekend breaks from the "empty nesters" and "active retired" with a general trend towards more frequent but shorter holidays.

- Continued awareness and growth in environmental matters, countryside recreation, interpretation and events, walking, cycling and special interest holidays.

- Continued expansion in business travel and conferences in line with the UK economy.

- Further growth to visit and stay with friends and relatives as the population and household numbers increase.

- Some growth in independent holiday travel and business travel from overseas markets but influenced by exchange rates and the image and confidence in Britain.

- Continued growth in day visits particularly for leisure shopping and countryside recreation.

THE STRATEGIC CONTEXT

2.7 "Tomorrow's Tourism" is the National Tourism Strategy for England produced by the Department for Culture, Media and Sport which provides the framework for the development of tourism at both a national and regional level. This identifies a number of priority areas :

- Sustainable development of tourism as a key theme of a successful tourism industry.
- Initiatives to widen access to tourism.
- Extra support for more focused and aggressive overseas promotion.
- Greater use of information and communication technology.
- Support for enhancing the image of tourism as a career.
- Raising the quality of training in the industry.
- Promotion of the new harmonised grading scheme for all hotels and guest houses.
- Improved promotion and development of Britain's cultural, sporting and natural heritage.

2.8 The English Tourism Council was created in 1999 by the Secretary of State. The ETC's job is to draw the fragmented sector together, take up issues, provide a focus, develop standards, give policy advice, undertake research and offer the latest intelligence about the tourism market to both Government and industry. The four key areas relate to leadership, quality, competitiveness and wise growth.

2.9 A number of national sectoral initiatives are now underway. These include :

- The Action for Attractions strategy produced by the ETC, which highlights the growth in competition and rising visitor expectations with recommendations covering market understanding, visitor satisfaction, management skills, benchmarking, raising quality, funding, taxation, planning and coordination.

- Working for the Countryside - A Strategy for Rural Tourism in England to 2005, produced by ETC and the Countryside Agency, which is based around the five principles of relating supply to demand, adding value locally, promoting quality of experience, maintaining an attractive countryside and taking decisions locally.

- The ETC Action Agenda on increasing access for Tourism for All, which has objectives to highlight growing market opportunities, make English tourism the most accessible and welcoming in Europe, widen tourism opportunities, improve access to employment, and widen access to England's culture, heritage and countryside.

2.10 Sector groups are also working on the National Sustainable Tourism Strategy and Indicators, the Transport for Tourism Strategy, the impact of ICT and information collection systems, and the future role of TIC's.

2.11 The establishment of ETC and the launch of the Regional Development Agencies across England has a bearing on funding sources and priorities. ETC have devolved a greater share of their funding to the regional tourist boards encouraging each to lead on specific projects. The Heart of England Tourist Board (HETB) is currently leading on two projects - access for all, and food and drink.

2.12 Tourism is seen as a vital regional economic sector within the East Midlands Development Agency (emda) Regional Economic Strategy - "Prosperity through People". This aims to put the East Midlands in the economic premier league of regions by 2010 and improve the quality of life. This highlights the importance of the promotion of tourism together with culture, sports and heritage as key generators of jobs and income, as a channel for economic regeneration and as a means of promoting the East Midlands image. Other regional strategies include the East Midlands Cultural Consortium Strategy, Regional Assembly Integrated Strategy and emda Urban and Rural Action Plans. Funding streams from emda are being channeled through new Sub-Regional Strategic Partnerships. This might generate additional funding for strategic tourism programmes.

2.13 There are other tourism funding opportunities through the public sector, principally the Single Regeneration Budget (6). The EU has various funding programmes limited to specific geographic areas and particular types of activity. Some programmes are in a state of change. The relevant programmes in Derbyshire are Objective 2, European Social Fund and LEADER. Other funding bodies relevant to tourism include the Countryside Agency, English Heritage, Learning and Skills Council, Small Business Service, Business Links and national lottery distributors, principally the Heritage Lottery Fund. The Rural Enterprise Scheme has been established to assist farm diversification.

2.14 The regional tourism strategy, "Visitor Focus", was published by the Heart of England Tourist Board in October 1997 and covers the period from 1998 to 2003. This has six strategic aims to:

- Strengthen leadership, partnership and expertise in tourism.
- Refocus and rationalise tourism marketing to reflect visitor awareness and interests.
- Coordinate and modernise the delivery of tourist information making it easier for the visitor to make bookings.
- Enhance the appeal of local destinations and increase the contribution tourism makes to local communities and environments.
- Improve accessibility to and within the region and the experience offered by different forms of transport.
- Improve the performance of tourism enterprises and their appeal to visitors.

2.15 There are a number of additional documents which have a close relationship with this management strategy. This includes the County Structure Plan, Derbyshire Cultural Strategy and Public Transport Plan. The last Visitor Strategy for Derbyshire was published by DTOG in 1998.

2.16 A number of complementary and linked local tourism strategies have been adopted and published within Derbyshire :

- Tourism Strategy for the Borough of Amber Valley 1993 - 2000
- District of Bolsover Leisure Plan 1999 - 2004
- Chesterfield Tourism Strategy 1999 - 2003
- Derby Tourism Strategy 2000 - 2005
- Derbyshire Dales District Council Tourism Strategy 1999 - 2004
- High Peak Tourism Strategy 1996

- A Vision and Economic Strategy for the High Peak 1997 - 2010
- North East Derbyshire Economic Development Strategy 2000 - 2005
- South Derbyshire Tourism Strategy 2001 - 2005
- Coalfield Alliance Tourism Strategy (prepared in 2001)
- The National Forest Visitor Strategy 1999 - 2002

2.17 The Peak District Sustainable Tourism Strategy has recently been produced by the Peak District Rural Development Partnership and will be implemented in parallel with this management strategy. There is common ground between the two strategies and it will be important to ensure they are complementary and add value. The Peak District National Park Authority and Peak District Rural Development Partnership are important to strategic tourism partnerships.

2.18 This management strategy covers the Derbyshire tourism context and fits between the local strategies and sub-regional / regional / national initiatives. It is an important link in the hierarchy.

SECTION 3
DERBYSHIRE TOURISM IN FACTS AND FIGURES

ECONOMIC IMPACT

3.1 The Tourism Economic Impact Assessment was commissioned by DTOG and published by HETB in February 2000. This refers to 1997/98 statistics. These are the headline results :

- In 1997/98 approximately 21.7 million visitors came to Derbyshire.

- The visitor market is made up of 2 million visitors who stayed overnight in Derbyshire (10%) and the larger proportion of 19.7 million visits (90%) on a leisure day trip (of 3 hours or more duration from home or holiday base, but not stopping overnight in the county).

- The overnight visitors stayed almost 7.2 million nights in total in Derbyshire.

- A total of £524 million was spent by visitors to Derbyshire. On average, about £44 million is spent in the local economy each month.

- Visitors staying overnight spent £233 million in Derbyshire, compared with £292 million from those on a day trip.

- The main beneficiaries of the visitor spending are : the catering sector receiving around £176 million, retailers around £140 million, accommodation sector around £81 million, transport, parking and fuel sectors around £78 million, and the entertainment, leisure and attractions around £49 million.

- The tourism sector provides around 19,400 jobs with approximately 14,000 direct tourism related jobs and an additional 5,400 non-tourism jobs dependent upon multiplier spend from tourism.

- Tourism supports actual jobs in five key business sectors :
  40% (5,550) in catering
  21% (3,000) in the accommodation sector
  19% (2,700) in retailing
  13% (1,800) in leisure, attractions and entertainment
  7% (1,000) in transport services.

3.2 Although information of this nature takes time to collect, analyse and disseminate, the most recent data is nearly four years old. This highlights the need for current and regular research.

TRENDS AND COMPETITIVENESS

3.3 The trends and competitiveness of the Derbyshire tourism sector is difficult to evaluate since the Economic Impact Assessment Model has not been run over a series of years or on a consistent basis in other counties. An indication of the relative performance of Derbyshire is given in estimates of the volume and value of tourism for the surrounding county areas for 1999. These figures have been aggregated down from national data and do not include day visits.

County 1999	Nights (m)	Spending (£m)
Greater Manchester	11.6	£469
Nottinghamshire	7.8	£263
Cheshire	6.2	£271
Warwickshire	4.9	£222
Derbyshire	**6.7**	**£201**
Leicestershire	6.1	£183
South Yorkshire	5.3	£168
Staffordshire	4.8	£153

3.4 This data can be broken down into the UK and overseas markets which has been collected on a regular annual basis. Derbyshire trends can therefore be broadly identified. This indicates (in the table below) overall growth in value over five years of 38% in the UK market and 10% in the overseas market. There is also growth in volume of 37% in the UK market but a decline of 9% in the overseas market. The 1999 data shows the overseas market made up 17% of the value and 12% of the volume of overnight trade in Derbyshire. However, there are some wide fluctuations in data from year to year and interpretation should be treated with caution.

	UK RESIDENTS		OVERSEAS RESIDENTS	
Year	Nights (m)	Spending (£m)	Nights (m)	Spending (£m)
1999	5.9	£166	0.8	£35
1998	4.3	£111	0.7	£30
1997	5.4	£149	0.9	£45
1996	5.9	£182	1.1	£36
1995	4.3	£120	0.9	£32

ACCOMMODATION STOCK

3.5 HETB records show there are 665 serviced accommodation establishments providing 10,635 bedspaces in Derbyshire. This is likely to be an under-estimate of the total stock since registration of accommodation is not compulsory and some small businesses operate on a seasonal or occasional basis. The breakdown highlights the small and fragmented nature of tourism businesses :

- B & B 41%
- Guest House 16%
- Farm House 13%
- Hotel 13%
- Inn 13%
- Country Hotel 3%
- Motel 1%

3.6 There are 663 non-serviced accommodation establishments. The breakdown is :

- Self Catering 86%
- Caravan Parks 9%
- Other / Group / Youth 5%

OCCUPANCY DATA

3.7 Serviced accommodation occupancy data is available from HETB on a monthly basis. This indicates the performance of Derbyshire compared to the region as a whole and several other counties over the last three years.

	1998	1999	2000	% Change
Derbyshire	**57%**	**55%**	**51%**	**-6%**
Peak District	47%	55%	53%	+6%
Staffordshire	59%	57%	57%	-2%
Leicestershire	63%	60%	58%	-5%
Heart of England	60%	58%	56%	-4%

3.8 The annual occupancy pattern for Derbyshire shows three distinct periods :

- The main season from July to October with room occupancy levels around 59%.
- The mid season from April to June with room occupancy around 56%.
- The off peak from November to February with room occupancy around 43%.

3.9 The occupancy pattern in the Peak District is similar with the main season from June to October exceeding Derbyshire levels yet quieter off peak periods.

3.10 These figures are likely to mask the difference between urban and rural locations. Hotels which are dependent on the business travel and conference market are likely to experience very high occupancy levels from Monday to Thursday year round although school holiday periods may be quieter.

VISITOR ATTRACTIONS

3.11 There are a wide range of visitor attractions in Derbyshire. The top five charging admission and the top five with free admission who have supplied data either to DTOG or to HETB are shown below. This highlights the difficult market conditions for visitor attractions reflected in the national context.

	1998	1999	2000
Admission Charge			
American Adventure	477,000	410,000	389,199
Chatsworth House and Gardens	477,544	319,666	341,848
Hardwick Hall	80,962	79,779	119,344
Caudwell's Mill	102,832	108,344	97,401
National Tramway Museum	86,057	84,360	75,525
Free Admission			
Upper Derwent Reservoir	2,000,000	2,000,000	not known
Carsington Water	not known	1,000,000	not known
Peak Village	not known	405,770	667,519
Staunton Harold Reservoir	405,000	405,000	not known
Denby Pottery	275,000	275,000	280,000

DERBYSHIRE VISITOR SURVEYS

3.12 Visitor surveys have been commissioned by DTOG and undertaken by HETB in recent years. A survey of nearly 2,500 interviews were undertaken at towns, villages and attractions outside the Peak District in 1998/99 and a comparable larger survey was undertaken within the National Park. The headline results and conclusions are contained in Appendix 1. In summary the visitor surveys showed :

- The vast majority of visitors (85%) were on a day trip and most had been before to Derbyshire on a regular basis (around 10 times per year).

- The origin of day visits is from within the county itself, whilst overnight visitors tended to come from the south, south-east and east.

- The average length of stay in the locality was around 4 hours and cars were used by 80% of visitors.

- 28% of visitors went walking once in Derbyshire - the other main activities were eating out, visiting attractions, shopping and touring around.

- High marks were given to the courtesy of local people, accommodation, TICs and car parking. Lower marks were given to public transport, public toilets and traffic conditions.

- The visitor profile showed a high number of couples without children with a mid to higher sector socio-economic profile.

SECTION 4
THE CHALLENGES

INTRODUCTION

4.1 The tourism sector in Derbyshire faces a number of strategic issues and opportunities. This section of the management strategy addresses the challenges.

4.2 These challenges have been identified "by the sector for the sector" through a consultative process which began in May 2001. The consultation included the local authorities through DTOG, County Council people in economic development, countryside, libraries and heritage, Peak District National Park Authority, emda, HETB, University of Derby, South Derbyshire Chamber, North Derbyshire Chamber, Business Link South Derbyshire, Business Link North Derbyshire, Conference Derbyshire, The National Forest Company, Environment Agency (for the National Heritage Corridor), Regional Attractions Consortium, selected hoteliers and the Farm Holiday Groups.

4.3 The challenges and potential way forward were summarised in a "Report for Consultation" produced in August 2001 and circulated through the local authority network. This culminated in a tourism conference organised by Derbyshire County Council for the tourism sector in November 2001. The delegates had the specific opportunity to address issues on the strategic management of tourism, marketing, training and business support. Further responses were invited over the following month.

4.4 During this consultation process there was total support for the proposal of a tourism strategy and high mutual regard for the work undertaken by the various agencies involved in tourism. It was universally acknowledged that Derbyshire has the product yet needs to focus on the management of tourism. The challenges that follow reflect aspects that require attention to increase economic activity, develop a sustainable approach and improve the competitiveness of the sector as a whole.

4.5 The start of the consultation process coincided with the outbreak of the national foot and mouth epidemic, whilst the latter stages took account of the immediate impact of the 11 September events.

FOOT AND MOUTH

4.6 The national Foot and mouth (FMD) outbreak started in February 2001 and a number of cases were soon confirmed in Derbyshire within the Peak District and South Derbyshire. This devastated the rural economy and parts of the tourism sector. A series of national initiatives were launched which focused political and media attention on the importance of the tourism sector to rural economies and the nation as a whole. A national Rural Task Force was established, working through the Regional Development Agencies and Regional Tourist Boards to deliver ongoing survival and recovery initiatives to the tourism sector.

4.7 The foot and mouth epidemic has short, medium and long term implications. Detailed surveys were carried out by HETB as part of the national research programme but results can only be broken down to the East Midlands region. The North Derbyshire Chamber also conducted research but this is not specific to the tourism sector. A survey of businesses attending the Peak District Sustainable Tourism Conference in December 2001 was undertaken. This indicated 57% of businesses had a decline in trade over the entire year.

Some are still struggling but others have experienced an increase. There was a small drop in seasonal employment.

4.8 The impact of restricted access to the Derbyshire countryside between February and June coupled with national media coverage in the UK and overseas had many affects :

- The temporary closure of many rural and wildlife attractions and the cancellation of major events affected the day visitor and weekend break markets which impacted on cash flow and the viability of attractions, accommodation establishments, event organisers and other rural tourism businesses. Some businesses which temporarily ceased trading are unlikely to re-open. Collectively this has a major impact on the ability to reinvest and market ahead.

- Many farms which have diversified into B&B and self-catering were seriously affected by the cancellation of bookings and absence of new enquiries. The B&B sector was badly affected. High quality self catering recovered quicker than other aspects of farm holidays.

- The walking and great outdoors market declined during the period when the rights of way were closed. This had a major impact in and around the National Park and other rural areas. This affected the trade and viability of small rural businesses who are dependent on tourism - B&Bs, activity centres, youth accommodation, pubs and restaurants, cafes, craft shops, transport operators, etc.

- Nationally there has been a decline in the overseas market, principally from North America. This has affected some hotels and attractions which normally receive high levels of overseas trade. This market may take two to three years to recover.

4.9 National and regional initiatives have been launched to address this nationwide crisis. Additional resources have been allocated to address the survival of small businesses and short term marketing initiatives. The package of measures include business support services, advice and consultancy, fiscal measures, PR and additional marketing campaigns. There is evidence that well managed businesses with repeat business and strong forward booking patterns have recovered quicker than the others.

4.10 The medium to long term tourism recovery plans must be addressed in Derbyshire. There is a need to protect and grow market share in the face of increasing competition and aggressive marketing campaigns from Wales, Scotland and other parts of England. The impact may take two to three years to overcome. The priority needs are :

- Business support and promotional work to help the farm tourism sector.
- Focus marketing resources on the countryside and walking.
- Support regional and national initiatives in overseas markets.

11 SEPTEMBER 2001

4.11 The 11 September 2001 was a watershed date affecting worldwide business confidence and the desire for international travel. The ongoing impact from the terrorist attacks in the USA on 11 September and the following war on terrorism is difficult to assess because of the uncertainty factor, although trends are starting to emerge.

4.12 There has been a substantial and immediate decline in the inbound holiday and business travel market particularly from the USA, coupled with a major shake up in the structure of the airline industry. This has reduced airline capacity whilst leading to a surge in supply and demand for budget fares and services. This has the contrasting impact in the domestic market of causing some people to now holiday in the UK instead of going overseas whilst others take advantage of the cut price airline deals particularly to European cities for short breaks.

4.13 Britain is being relaunched in the USA and other key overseas markets. However, many hotels in London and the heritage cities have seen a decline in overseas corporate business and group travel. These businesses are now targeting the UK market and cutting tariffs which may have a displacement affect in provincial destinations.

VISITOR INFRASTRUCTURE

4.14 The challenges to address can be summarised as :

- The growing importance of tourism as a means for rural and urban regeneration.

- The emergence of areas such as The National Forest, National Heritage Corridor, Derby City and North Eastern Derbyshire.

- Traffic management, parking and footpath erosion at peak times / honeypot locations in the National Park.

- The important tourism roles of places such as Buxton and Matlock which are perceived as part of the Peak District although outside the National Park.

- The general visitor infrastructure needed to support current and future market demand.

- The desire for additional resources to establish the National Heritage Corridor in tourism markets.

- The continued expansion of The National Forest tourism initiatives.

- Working with local communities to help develop plans for tourism.

- Building stronger links between the tourism sector and creative industries - performing arts, creative artists, crafts people, community arts, festivals, etc.

- The opportunity for tourism applications of the "Source Derbyshire" campaign to promote local products within accommodation, catering outlets, tourist shops and TICs.

- The further development of food and drink product initiatives, award schemes and promotions.
- The opportunity for further countryside interpretation projects and public art.

- Further development of the network of multi-user routes and national long distance walking and cycling routes to establish an integrated infrastructure across Derbyshire.

- The need to integrate the national cycle network into marketing and information initiatives.

- The desire to improve disability awareness within the sector and highlight the implications of the Disability Discrimination Act that shortly come into effect.

TRANSPORT

4.15 The challenges to address can be summarised as :

- The need for improved public transport services for visitors particularly to rural areas.

- The need for improved promotion and packaging of public transport services integrated within tourism marketing.

- The longer term development of rail links such as the Matlock to Buxton line and tourism spin-offs.

- The potential for a pilot shuttle bus service scheme for visitors, with circular sightseeing routes from transport nodes.

- The opportunity to review tourism signposting policy in the light of experience over the last five years and allow a more flexible attitude to assist rural regeneration.

- The need to improve Derbyshire visitor information at the gateway airports and ensure the airports are an integrated part of the public transport network.

- The provision of coach parking and coach driver's rest facilities.

ACCOMMODATION AND ATTRACTIONS

4.16 The challenges to address can be summarised as :

- The need for an assessment of accommodation demand across Derbyshire to identify areas and locations where additional bedspaces are required.

- The need to match product development to the market segments which are to be targeted.

- The need for improved conference and exhibition facilities.

- The opportunity for additional budget hotel development in parts of Derbyshire.

- The opportunity for additional high quality self-catering accommodation in suitable locations.

- The need for a flexible approach to self-catering occupancy planning conditions to allow long winter lets to support business viability.

- The need to improve standards at some accommodation establishments.

- The need to ensure that any additional visitor attractions are demand led and have off-peak potential.

- The need to improve quality standards at visitor attractions and introduce an inspected only policy in tourism marketing by 2004.

- The opportunity to extend the season through longer opening and event development at visitor attractions.

- The positive impact of the new University Campus and Tourism School including a hotel and visitor attraction on the economy, environment and culture of Buxton.

- The plans to re-establish Buxton Spa and regenerate the tourism market.

- The need for a Tourism for All audit and promotion of disability awareness.

SKILLS AND BUSINESS SUPPORT

4.17 The challenges to address can be summarised as :

- The need for a skills gap analysis.

- The need to analyse regional research about training needs to identify the specific needs of the tourism sector in Derbyshire.

- The opportunity to work with the University of Derby in the wider context of business support, lifelong learning and research projects.

- The need for additional business support initiatives to address marketing, business planning, finance and debt management.

- The desire for an accommodation consortium across Derbyshire to develop self help initiatives, provide networking opportunities and a lobbying voice for the sector.

- The opportunity to improve awareness by front line staff of local attractions and events.

- The desire for countywide tourism business advisory service with specialists in each sector (hotels, farm holidays, etc).

- The need to raise awareness of good green practice amongst businesses and promote good practice to visitors.

- The need for careers guidance and modern apprenticeships in the tourism and countryside sectors.

- The need for a clearer understanding across the sector of ICT opportunities and the implications of the proposed Destination Management System.
- The need for effective coordination across Derbyshire on business support services coupled with a single point of contact / one-stop shop.

- The opportunity for partnership with Business Link and the new Learning and Skills Council.

- The opportunity to give small businesses the chance to make a greater input to strategic initiatives.

- Accreditation and tourism / hospitality qualifications which should underpin partnership work.

RESEARCH

4.18 The challenges to address can be summarised as :

- The need for adequate funds to carry out regular and consistent research.
- The need for improved dissemination of existing tourism research summaries.
- The need for a single point of contact / source on Derbyshire tourism research.
- The opportunity for market data fact sheets for potential tourism investors.
- The opportunity for benchmarking projects to identify trends and competitiveness.
- The need for further Derbyshire volume and value surveys to demonstrate the importance of tourism and measure change over a period of time.
- The need for a coordinated cycle of volume and value surveys at the District Council level.
- The need for further market research into potential customer segments.
- The opportunity to establish a standard visitor questionnaire distributed by businesses, analysed centrally and disseminated to the sector.

INFORMATION SERVICES AND TECHNOLOGY

4.19 The challenges to address can be summarised as :

- The need to develop, manage and resource a Destination Management System for the Peak District and Derbyshire.
- The need to involve the private sector in ICT initiatives.
- The urgent need for an online network between Derbyshire TIC's.
- The implications on the role of TIC's once the DMS is established, specifically relating to footfall, services and visitor income.
- The need for central tourism databases of tourism businesses, events, visitors and enquiries.
- The opportunity for literature distribution through libraries to support the local and visiting friends and relatives markets.
- The opportunity to make greater use of online library service resources for visitors.
- The need for additional links between tourism web sites.
- The opportunity for tourist information points at village post offices and other rural sites.
- The need to improve tourist information at the public transport gateways (rail and bus stations, airports).

MARKETING AND BRANDING

4.20 The challenges to address can be summarised as :

- The need to increase the use of market segmentation techniques.

- The need to rationalise marketing responsibilities and activity within the public sector to avoid duplication.

- The opportunities within the Destination Management System to develop relationship marketing.

- The opportunity to develop product marketing initiatives on themes such as walking, historic houses, film and TV locations, factory and mill shops, well dressings and customs, food and drink, industrial heritage, arts, culture and festivals.

- The opportunity for tourism marketing partnership involving the Countryside Information Services to create a "Walking in Derbyshire" short breaks promotion, linked to public transport, assisting visitor management and rural recovery initiatives.

- The opportunity to focus on established destinations such as the Peak District and emerging destinations - The National Forest, National Heritage Corridor, Derby City and North Eastern Derbyshire area, and potentially the Derwent Valley Mills World Heritage Site.

- The need to address branding issues in a geographic and product context.

- The need to approach overseas activity, group / travel trade activity, education market and Tourism for All activity which requires the critical mass at the Derbyshire level to be effective.

- The need to focus on trade and consumer PR activity at the Derbyshire level in UK and overseas markets.

- The need for a one-stop image library.

- The opportunity for tactical off peak promotions in spring (April, May) and autumn (September, October).
- The opportunity to use festivals and cultural links to help extend the season.

- The desire for a central tourism database including events.

- The need for funding support for countywide conference marketing activity in the UK and overseas.

- The ongoing expansion of Conference Derbyshire into event management.

- The potential relationship between tourism and conference marketing to encourage business visitors to return on short breaks.

- The need to improve marketing communication between the public and private sector.

COMMUNICATION AND LIAISON

4.21 The challenges to address can be summarised as :

- An absence of an overall strategic tourism management body or partnership.

- The opportunity for a "bottom up" partnership involving the private sector and coordinated by the County Council.

- The lack of communication and limited networking opportunities between different parts of the tourism sector.

- Some dangers of fragmentation and duplication.

- The lack of tourism partnerships outside of marketing.

- Overall private sector engagement at a strategic and countywide level.

- Internal County Council tourism liaison and the need for a single point of contact (covering areas such as economic development, countryside service, public transport and culture, libraries and heritage).

- The desire for designated County Council tourism resources to support strategic initiatives.

- The need to review models of best partnership practice in tourism management in the UK.

- The urgent need for a strategic partnership to take ownership of the tourism strategy and drive it forward.

SUB REGIONAL DIMENSION

4.22 In spatial terms tourism in Derbyshire loosely falls into five areas : the Peak District, the Derwent Valley, Derby City, The National Forest and North Eastern Derbyshire. Each has different characteristics and is at a different stage in the evolution of tourism. This demonstrates the importance of tourism management within economic regeneration and the importance of new and emerging destinations as part of the overall strategic tourism planning and visitor management within Derbyshire.

Peak District

4.23 The Peak District is nationally recognised and a major brand within the region. The National Park receives more than 22 million visits and is the second most visited in the world. This area includes the National Park extending into the neighbouring counties to the north and west although is often synonymous with Derbyshire. The area experiences high numbers of day visitors where sustainable tourism initiatives, visitor management and public transport are priorities. The impact of foot and mouth has been severe. There are opportunities to lengthen the season and develop the short break market. There are plans to redevelop the Crescent at Buxton and establish new spa facilities. The impact of the University campus at Buxton will generate new local tourism opportunities. This area is a well established tourist destination.

The Derwent Valley

4.24 This is an area incorporating the National Heritage Corridor and encompassing the potential Derwent Valley Mills World Heritage Site. The main focus is countryside recreation and industrial heritage. The profile and infrastructure needs to be addressed if World Heritage status is granted. There are limited resources at present to increase the momentum of the National Heritage Corridor initiative. This is a popular visitor destination although the brand is not widely recognised in tourism markets.

Derby

4.25 This is an established destination in the corporate business travel, meetings and conference market with high midweek hotel occupancy. It is becoming increasingly important as a city break destination highlighted in the development of Rams Football Weekends. Strategic product development is desirable to address the shortfall in a modern conference venue and four-star hotel. A range of city centre regeneration initiatives are in place. There has been successful promotion to niche markets and event development. This is an established destination in the corporate market.

The National Forest

4.26 This is a major woodland, economic regeneration and visitor initiative which is moving forward rapidly. The designated area extends into Leicestershire and Staffordshire. The main focus has been countryside recreation, interpretation, events and community projects. Conkers / Heart of the Forest is a major new flagship attraction. The day visit market and schools are important. The accommodation stock is growing slowly from a very low base. This is an embryonic destination with strong momentum.

North Eastern Derbyshire

4.27 This area is part of the new Coalfield Alliance which extends into Northern Nottinghamshire. Tourism is playing an increasingly important role within regeneration work. The main focus is infrastructure, community projects and countryside recreation. Product development, business support, information services and quality standards are priority areas. Chesterfield is an important centre for the corporate market and acts as a base for the Peak District. This is an embryonic destination.

SUMMARY

STRENGTHS ❖ Peak District National Park ❖ Scenery and countryside ❖ City, market towns and attractive villages ❖ Historic houses and gardens ❖ Museums and heritage ❖ Major attractions ❖ TV and film location ❖ International festivals ❖ Well dressings and customs ❖ Brand names ❖ Factory and mill shopping ❖ Accommodation base ❖ Farm tourism ❖ TIC network ❖ Derby City and premier league football ❖ Central UK location, good access ❖ Proximity of major airports ❖ Established local authority tourism marketing partnership	**OPPORTUNITIES** ❖ Product fit with growth markets ❖ Spreading economic benefits ❖ Spring and autumn marketing ❖ Improve quality standards ❖ National Heritage Corridor ❖ World Heritage Site status ❖ National Forest and NE Derbyshire ❖ European funding ❖ Rural regeneration funding for tourism ❖ Coal field regeneration funding ❖ Source Derbyshire ❖ Food and drink ❖ Creative industries and public art ❖ Outdoor activities ❖ Sport and recreation ❖ Sustainability and green movement ❖ Walking and cycling initiatives ❖ Wider strategic tourism partnership with private sector involvement ❖ Destination management system ❖ Best value
WEAKNESSES ❖ Lack of distinctive identity ❖ Inconsistent quality standards ❖ Traffic congestion ❖ Public transport services ❖ Fragmented resources ❖ Funding programmes distort spatial allocation of public sector resources ❖ ICT development ❖ Business support coordination ❖ Dated research ❖ Strategic tourism management and planning ❖ Lack of targets, performance indicators	**THREATS** ❖ Foot and mouth impact ❖ War on terrorism ❖ Rural regeneration and economy ❖ Strength of £ in overseas markets ❖ Continued day visitor pressure ❖ Traffic congestion ❖ Competition for leisure time ❖ Strength / resources of other destinations ❖ Some attractions vulnerable / at risk ❖ Local authority variable commitment ❖ Lack of shared vision ❖ Lack of investors ❖ Unpredictable climate change ❖ Apathy and inertia

SECTION 5
STRATEGIC MANAGEMENT AND SECTOR PARTNERSHIPS

2020 VISION

5.1 This strategy is an important stepping stone towards the wider vision for Derbyshire in 2020. The tourism component is to ensure Derbyshire is a premier tourist destination with a responsible and competitive tourism sector, working in partnership, to boost economic growth and rural regeneration, contributing to the sustainability of local resources and communities.

THE STRATEGIC FRAMEWORK

5.2 Tourism is a complex and fragmented industry. It is often difficult to define whilst the importance of tourism to local economies is not always recognised. The sector consists of many small businesses. A range of local authorities and other public sector agencies are now involved in different aspects of delivering tourism services. The issues of communication, coordination and strategic management are therefore fundamental to effective working and wise growth.

5.3 The success of this strategy depends on effective delivery. The structure and resources need to be in place to meet the challenges and deliver the actions. The organisations involved in the delivery need to take a key role in the development of the actions.

5.4 The tourism management structure is partially in place and there is a good track record of cooperation but little strategic linkage. Strategic management needs to be addressed to establish a structure for partnership, cooperation and a mechanism to link local activity around strategic tourism principles. Resources are fragmented and not necessarily pooled to best effect.

5.5 Consequently, the strategic management structure and communication issues need to be resolved prior to developing the delivery plan. The strategy therefore contains four stepping stones :

- Establish a series of pledges and their themes, reflecting the challenges, regional and local programmes.

- Establish the strategic management structure to coordinate and communicate the pledges.

- Establish sector groups who will be the delivery mechanisms within this structure.

- Establish annual delivery plans for each sector group.

5.6 The new management structure is based on the principle of more effective and efficient allocation of existing resources. However, a new structure is likely to carry some administrative implications and resource demands.

STEP 1 : THE PLEDGES

5.7 The strategy is based on a six pledges, each having appropriate themes which address the challenges identified in section four.

PLEDGE 1

To encourage sustainable product development and investment in the infrastructure to raise quality standards.

THEMES (Challenges paragraph 4.14, 4.15 and 4.16)

Regeneration, visitor management, emerging destinations and infrastructure, Source Derbyshire supply chains, food and drink, creative industries, countryside interpretation, public transport, signposting, multi-user routes, cycling, quality standards, disability awareness, accommodation demand, inward investment, extending the season

PLEDGE 2

To improve performance and standards in the tourism sector by investing in people.

THEMES (Challenges paragraph 4.17)

University Buxton campus, training needs, business support and advice, foot and mouth recovery, product familiarisation, best practice, green practice, accommodation network, Business Link, Learning and Skills Council

PLEDGE 3

To take an integrated approach to tourism research to establish a centre of expertise to underpin marketing and investment.

THEMES (Challenges paragraph 4.18)

Funding, dissemination, sourcing, market data, benchmarking, volume and value, visitor surveys

PLEDGE 4

To coordinate and modernise the delivery of visitor information through a Destination Management System for the Peak District and Derbyshire.

THEMES (Challenges paragraph 4.19)

DMS implementation, TICs, databases, literature distribution, libraries, linkages, tourist information points, gateways

PLEDGE 5 **To promote Derbyshire as a visitor destination based on the principles of market segmentation.** THEMES (Challenges paragraph 4.20) Rationalisation, product campaigns, country walking, emerging destinations, overseas, group travel, tourism for all, PR, off peak promotions, database, conference marketing

PLEDGE 6 **To follow the principles of business excellence and best value to work in partnership to deliver the Tourism Management Strategy.** THEMES (Challenges paragraph 4.21) Strategic management, communication, networking, partnerships, resources

STEP 2 : THE STRATEGIC MANAGEMENT STRUCTURE AND COMMUNICATION

5.8 The Derbyshire Tourism Task Force should be established. This would be a group of representatives from the public and private sector charged with the overall responsibility to :

- Oversee and manage the delivery of the tourism management strategy.
- Coordinate the work of the sector groups.
- Develop communication channels across the sector and networking opportunities.
- Form a bridge with other sectors such as regeneration and inward investment.
- Help make the case for tourism and resources.
- Update and roll forward the management strategy.

5.9 This would be a group of people made up from the :

- Local authority members with officer support.
- Representative private sector people (such as the chair of groups such as Regional Attractions Consortium, Conference Derbyshire, Farm Holiday Groups).
- Regional and sectoral agencies (such as HETB, emda, business support, training, creative industries, countryside, heritage).
- Sub-regional partnerships (such as Peak District Sustainable Tourism Forum, Peak District Rural Development Partnership, The National Forest company, CHART / Coalfield Alliance, National Heritage Corridor).

5.10 This list is not exhaustive but should be contained to around 20 to 25 people to remain manageable, focused and effective.

5.11 The Task Force would need to formalise it's remit and representation. It would need to determine the frequency and format of meetings. Once established it might meet twice per year - in spring to approve budgets and programmes for strategic initiatives, and in autumn to review progress. This would clearly carry an administrative responsibility.

5.12 The wider communication would be addressed through the filtering down / feeding up process between the Task Force representatives and the individual members of the sectors / areas they represent. This could be supplemented by a range of communication initiatives such as :

- An annual Derbyshire Tourism Conference, repeating the success of the 2001 event, to report on progress, outline forthcoming initiatives, disseminate best practice and provide a networking opportunity.

- A twice yearly newsletter to update the sector, disseminate latest news and provide details of forthcoming marketing opportunities. This could be distributed online via the Destination Management System.

5.13 The first step in establishing the Task Force would be a joint partnership agreement between the local authorities involved in tourism at a member level. This would provide the foundation on which to develop stronger public sector links across the tourism industry with bridges into other related sectors. It also provides the platform to draw the private sector into a genuine strategic partnership. This process has begun with the joint local authority meeting hosted by the County Council in January 2002.

STEP 3 : SECTOR GROUPS

5.14 A series of sector groups should be established, building on existing structures to develop and deliver the programmes of activity. Each group should have a remit and timeframe and be accountable to the Task Force. These would be a mix of new and existing or refocused groups. The decision on the number and scope of groups plus when to set them up would rest with the Task Force.

THEMES	**DELIVERY**
Strategic management, communication, networking, partnerships, resources	**Tourism Task Force**
	EXAMPLES OF EXISTING GROUPS
Tourism marketing - rationalisation, product campaigns, country walking, emerging destinations, overseas, group travel, festivals, tourism for all, PR, off peak promotions, database	Tourism Marketing Group (currently DTOG)
Conference marketing and events	Conference Derbyshire
Farm tourism	Farm Holiday Groups
Visitor attractions	Regional Attractions Consortium
DMS implementation, TICs, databases, literature distribution, libraries, linkages, tourist information points, gateways	Destination Management System Steering Group
	EXAMPLES OF NEW GROUPS
Regeneration, visitor management, emerging destinations, infrastructure, supply chains, countryside interpretation, creative industries, public transport, signposting, multi-user routes, cycling, quality standards, disability awareness, market segment needs, accommodation demand, inward investment, extending the season, local plans	Product Development Group
University Buxton campus, training needs, business support and advice, product familiarisation, best practice, green practice, accommodation network, Learning and Skills Council	Skills Group
Funding, dissemination, sourcing, market data, benchmarking, volume and value, visitor surveys	Research Group

5.15 An outline of the possible membership and examples of delivery priorities are provided as a starting point. The Task Force and each respective group should review this. There is a need to finalise the membership, remit and frequency of meetings. Private sector involvement will be essential. It is anticipated that some might need to meet quite frequently, particularly for tourism marketing, but others such as research might only need to meet once or twice per year to fulfill their role.

TOURISM MARKETING GROUP

Membership : currently DTOG

Examples of Delivery Priorities :

- Prepare and annually update a three year rolling marketing plan for the sector with a balanced mix of promotional activity, based around the series of areas and products.

- Establish an annual joint marketing budget based on local authority contributions, private sector support and sponsorship.

- Develop product marketing campaigns based around historic houses, film and TV locations, factory and mill shops, well dressings and customs, food and drink, industrial heritage, arts, culture and festivals.

- Develop a new “Walking in Derbyshire” promotion.

- Develop new Tourism for All marketing initiatives.

- Maintain group and travel trade promotional initiatives.

- Maintain PR initiatives.

- Develop new tactical spring and autumn marketing campaigns.

- Ensure the Research Group covers market research requirements and campaign evaluation needs.

- Undertake market segmentation work to focus overseas activity building on regional initiatives.

- Develop links with the marketing of heritage, museums and the creative industries.

- Develop a tourism plan within the East Midlands Screen Commission.

5.16 These types of delivery priority fall within the current scope of work undertaken by the Derbyshire Tourism Officers' Group. Their marketing plan for 2003 and joint funding is currently being finalised. It is essential to ensure there is continuity in marketing activity with a seamless transition as the Group evolves under the wider umbrella of the Task Force. Consequently DTOG activity and funding should continue for one more financial year (2002/03) building on the work and achievements to date. The new format of the Tourism Marketing Group would then take the marketing plan forward in 2003/04. Over the course of 2002/03 DTOG should be relieved of strategic management work once the Task Force becomes fully established.

PRODUCT DEVELOPMENT GROUP

Membership : County Council, District Councils, City Council, Peak District National Park Authority Park, HETB, emda, sectoral organisations - culture, heritage, etc.

Examples of Delivery Priorities :

- Assist and guide the strategic tourism development within the emerging sub-regional destinations.

- Develop supply chains for the Source Derbyshire initiative to have tourism applications, and assist regional food and drink tourism initiatives.

- Develop tourism opportunities within the Countryside Services activities.

- Identify visitor needs and perceptions of public transport and identify initiatives to boost non-car travel.

- Encourage the development of the Matlock to Buxton rail link.

- Review tourism signposting guidelines.

- Encourage appropriate inward investment in new hotel and conference facilities.

- Raise awareness and encourage participation in the visitor attractions quality assurance scheme, Tourism for All accreditation scheme and implications of the Disability Discrimination Act.

- Assist tourism liaison within the County Council and establish a single point of contact.

SKILLS GROUP

Membership : Local Authorities, Chambers, Business Links, University, Small Business Service / Learning and Skills Council, HETB

Examples of Delivery Priorities :

- Identify key priorities in terms of recruitment, retention and training needs working with industry, local authorities, training providers and other agencies to pilot initiatives.

- Assist the University to maximise the tourism opportunities through the new campus development in Buxton.

- Establish close partnerships with the Learning and Skills Council, Small Business Service and other key agencies to ensure the needs of the tourism sector feature as a key priority.

- Encourage the development of a countywide network of Personal Tourism Business Advisers.

- Develop mechanisms for ensuring the training and business support needs of the tourism industry (particularly small businesses) are better understood and met by colleges and other training providers.

- Develop activities / events which raise the profile of the tourism industry as a first choice career and which promote opportunities for progression within the industry.

- Ensure that businesses who are affected by the foot and mouth impact are aware of business support services, and deliver advice and training as part of the regeneration plan.

- Identify and promote examples of best practice in green tourism.

- Secure funding to help sustain successful recruitment and retention pilot programmes and which encourage continual employer investment in people.

- Ensure training and business support for the Derbyshire tourism industry continues to be relevant, affordable and accessible.

RESEARCH GROUP

Membership : Local authorities, University, HETB

Examples of Delivery Priorities :

- Identify joint funds for a rolling programme of tourism research.

- Prioritise new research needs and manage new research projects.

- Interpret and disseminate published tourism and market data.

- Build up and disseminate a research databank.

- Evaluate marketing campaigns.

- Oversee the programme of volume and value models across Derbyshire and establish trend patterns.

- Investigate consumer research into the awareness and understanding of destination brands within Derbyshire.

- Provide developer and investor product and market information to facilitate their investment decisions.

- Undertake research to underpin market segmentation.

- Establish benchmarking initiatives with other destinations.

- Carry out ongoing research into customer satisfaction levels.

- Introduce standardised customer questionnaires at tourism businesses.

STEP 4 : THE DELIVERY PLANS

5.15 Each sector group should prepare a Delivery Plan that describes each priority in more detail, identifies the specific tasks, partners, leadership, targets, milestones and resource implications in terms of budget, staffing and skills. A template is provided to enable this work to be done in a consistent format. The responsibility for completing each template rests with members of each sector g overseen by the Task Force.

TEMPLATE

DESCRIPTION :

DELIVERY :		
TASKS	PARTNERS AND LEADERSHIP	TARGETS AND MILESTONES

RESOURCE IMPLICATIONS :
BUDGET
STAFFING
SKILLS

APPENDIX 1
DERBYSHIRE VISITOR SURVEYS

A visitor survey was undertaken in Derbyshire in 1998 / 99 by HETB for DTOG and the results were published in October 1999. The survey covered nearly 2,500 interviews conducted at towns, villages and visitor attractions outside the Peak District between July and November 1998 and May and August 1999.

These are the headline results :

- The vast majority (around 85%) were on a day visit from home with the remainder on holiday and few were from overseas.

- The choice of destination for the trip was equally divided between coming to shop, being easy to get to, visiting an attraction or film location and returning since they had been before. Only 15% came because it was somewhere new.

- The over-riding image of the area was beauty and scenery followed by rural countryside and outdoors. The main features which were liked were the scenery, peace and tranquillity, ease of access and heritage.

- The origin of day visitors was Derbyshire itself, followed by Nottinghamshire and South Yorkshire. Counties in the north-west did not feature.

- The origin of overnight visitors was predominantly to the south, east and south-east : London, Surrey, Hampshire, Kent, Essex, Hertfordshire, Suffolk, Norfolk and Lincolnshire. The north and west did not feature. The dominant countries were Australia, USA, Canada and Germany.

- The level of repeat visits was high - 83% had been before to Derbyshire or the Peak District. The day visitors make frequent trips, in the order of 10 or 11 trips per year.

- The average length of holiday was 5 to 6 nights. Serviced accommodation was the most frequent followed by staying with friends and relatives and self catering.

- The average length of stay at the locality was around 4 hours, or a half day.

- The car was the main means of travel applying to 80% of visitors. Public transport accounted for 7% of trips. 28% of people went walking once in Derbyshire.

- The reasons for not using public transport were inconvenience and inflexibility. Overall some 50% rarely or occasionally use public transport, 22% never use it and 19% frequently use it.

- The best time of year for short breaks in Derbyshire was seen as the summer (July to September) followed by spring (April to June) and autumn (October to December).

- The main activities undertaken on the trip were eating out, visiting attractions and museums, shopping, touring around, visiting villages and market towns and walking / rambling.

- Most people did not seek information before their visit reflecting the low percentage of first time visitors. Those that did tended to pick up information from the TIC in their home area. 24% used information whilst in Derbyshire predominantly from information racks at attractions or TICs.

- The highest ratings were given to the courtesy of locals followed by accommodation, TICs and car parking availability.

- The lowest ratings were given to public transport, public toilets and traffic conditions.

- The lead time to make the trip was short with over half deciding on the day or previous day.

- Almost three-quarters were not members of any national or local countryside or heritage organisation. The top three organisations amongst the rest were National Trust, English Heritage and RSPB.

- 70% of visitors did not have children in their party. A high proportion (30%) were by themselves. The couples market was significant.

- The market profile was broadly mid to higher sector with 27% of visitors from AB socio-economic groups, 36% from C1, 20% from C2 and 17% from DE.

- The main beneficiaries from spending were accommodation, places to eat and drink, non food shops, entertainment / attractions, parking / transport / fuel and food shops.

- The spend per head per day ranged from £40 for overnight visitors in serviced accommodation, £12 for day visits to £9 for those staying with friends and relatives.

WIDER DERBYSHIRE AND PEAK DISTRICT SURVEY

A comparable wider visitor survey covering the Peak District in Derbyshire and Staffordshire was also conducted by the Heart of England Tourist Board over a similar period. Further surveys were also undertaken in Chesterfield and Derby. The results were published in November 2000. This network of surveys provides results for nine different areas in Derbyshire and the wider Peak District. The surveys show how the visitor picture varies from north to south and east to west.

The summary and conclusions are :

- The type of visit was broadly similar across the area with 68% on a day visit. There was a greater proportion of overnight visits in and around the National Park as well as Chesterfield. The proportion of day visits was greater in the south, Erewash and Amber Valley. The main area for visits to friends and relatives correspond to the more populated areas such as Derby and the surrounding districts.

- The most popular reasons for day visits related to scenery, landscape and walking particularly in High Peak, Derbyshire Dales and South Derbyshire. Shopping was a popular reason for visiting Derby and Chesterfield. Peace and quiet was associated with the core rural areas. A new place to visit was a more noticeable factor outside the Peak District.

- The most popular reasons for overnight visits were outdoor activities and walking followed by scenery and landscape particularly in the Peak District. Sightseeing was more significant in North East Derbyshire, Bolsover, Erewash and Amber Valley. Attractions and events were important motivators in the M1 / A38 corridor destinations.

- The overseas market was not significant. The main purpose was sightseeing and a new place to come, plus the landscape of the Peak District.

- Nearly a third of day visitors came from Derbyshire itself, with higher percentages in the central and eastern districts. Nottinghamshire was important to the east and Cheshire to the west. South Yorkshire had the highest impact in the Peak District. The conurbations of Manchester and the West Midlands rarely featured.

- The key originating areas for overnight visitors were the south-east and home counties with very few from the northern counties.

- The most popular type of accommodation used was self catering particularly in the Peak District. Visiting friends and relatives was popular in the south, Derby and Chesterfield. Caravanning was popular across Derbyshire except in the north-east and Derby.

- The length of day visit varied from 2 to 5 hours with longer stays in and around the Peak District and shorter stays in the south.

- The average length of holiday by overnight visitors was 5 nights with a slightly higher average for self catering and caravanning. Figures were marginally lower in the Peak District. Around 45% of UK trips were short breaks (under 3 nights) with two night breaks the most popular, and 55% were longer holidays (over 4 nights) with 7 nights the most popular. Short breaks were higher in proportion in the High Peak and Derby.

- In total 81% of visits were repeat visits to Derbyshire. The proportion of new visitors was higher in Derby, Amber Valley and Erewash. The percentage of new overnight visitors was 29%. Around 30% of overnight visitors had been to Derbyshire on a day visit before.

- The overall socio-economic profile was mid to up market with a higher profile to the north and west compared to the east.

- The demographic profile of day visitors showed 28% with children. The most popular family destinations were South Derbyshire and Amber Valley / Erewash. There was a broad age spread from 25 upwards across Derbyshire. The demographic profile was broadly similar for overnight visitors.