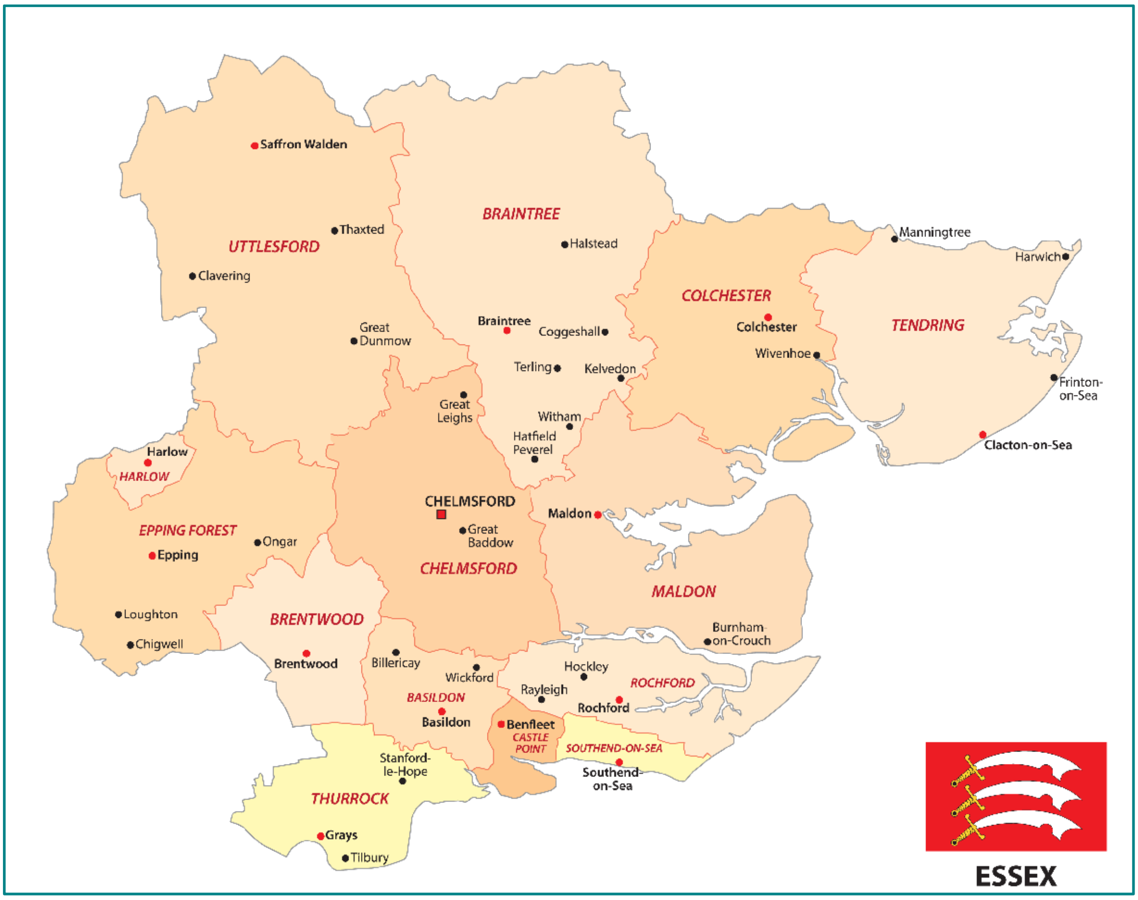
Essex Destination Management Plan

2024 – 2030



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FOREWORD

Essex is a great place to live, work, visit and enjoy.

This Strategy will help both residents and visitors find out about the County and experience its many and varied attractions, accommodation, events, pubs, bars, restaurants and a lot extra besides.

But the Strategy is about much more than that. It is central to helping us deliver many of the commitments that the Council has made in Everyone's Essex: for good jobs, sustainable growth, a place where there is opportunity for all, a reduced carbon footprint, sustainable travel and healthy lifestyles. The visitor economy can contribute positively to all these commitments if we work together, are aligned and have purpose.

In Essex, the visitor economy is worth £3.3 billion and employs 63,000 people. That makes it larger than our construction sector, manufacturing or financial services. But it is usually well hidden from view, in thousands of small businesses across the County, and so much less visible than a large factory or office building. We ignore it at our peril.

This document sets out how we can harness the opportunity to grow the Visitor Economy and do it in such a way that it protects the environment and what attracts people here in the first place; adds value in terms of jobs and income; and also enables us to broaden peoples' perceptions of the place we call home.

Designing the partnerships that are now needed to make all this happen is an important next step. I would urge you to get involved, whether you're from public, private or third sectors to help us realise this Vision.

This is Everyone's Essex and everyone is welcome.

Kevin Bentley
Leader
Essex County Council

As the national tourism board for England, we are pleased to endorse this Destination Management Plan for Visit Essex.

Great destinations are great places to live and work as well as to visit and strong governance can drive place-shaping and shift local and wider perceptions of the place, which can contribute to local pride. Well run destinations can also attract new investment, increase income and create new jobs.

We were delighted to award Local Visitor Economy Partnership (LVEP) status to Visit Essex in 2023. Since then, the LVEP has worked closely with stakeholders and consulted widely across the destination to create this Destination Management Plan. The key principles of sustainability, accessibility, quality, partnership and connectivity run through the plan. The plan builds on a long history of working with stakeholders across Greater Essex. This plan puts Visit Essex in a very strong position to continue to lead the development, management and marketing of the destination and deliver on its strategic intentions.

A key recommendation of the Government response to the de Bois Review of Destination Management Organisations (DMOs) in England was the creation of Local Visitor Economy Partnerships (LVEPs) programme. The LVEPs work closely with us at VisitEngland and are at the heart of transforming the visitor economy landscape supporting its cohesion and growth in a more inclusive, accessible and sustainable way. The programme is going from strength to strength as the number of LVEPs increases, representing more of England

At VisitEngland, we look forward to working with the Visit Essex LVEP and their partners to help realise the ambitions set out in this plan.

Andrew Stokes, OBE
England Director
VisitEngland

1. EXECUTIVE SUMMARY

This Destination Management Plan (DMP[1]) provides a platform to bring together the public and private sectors, key stakeholders and organisations active in the visitor economy and provides the inspiration and opportunity to develop and grow Essex as a leading visitor destination.

This Plan is collaborative and solutions focused, with key priorities centred on leadership, business development, connectivity, job creation and the skills and retention of talent. It also prioritises improvements to the perception of Essex. The importance of the sustainable development of the visitor economy is also centre stage - a thread running throughout this Plan. All activities will be seen through a sustainability lens: reducing carbon, improving nature, prioritising local supply chains and building connections to communities.

The Plan provides the platform to develop and grow a contemporary and dynamic visitor economy, making a substantial contribution to the economy and communities of Essex to 2030 and beyond.

1.1 OUR INTENT

Our commitment is for a destination with a refreshed identity, a reputation for local distinctiveness, a warm welcome and a wealth of hidden gems. Working through strong partnerships we will unlock the power of the visitor economy in Essex, boldly showcasing its strengths and celebrating our spirit, diversity and distinctive offer.

1.2 STRATEGIC AIMS

The key principles of this DMP are sustainability, accessibility, quality, partnership and connectivity. All actions and activities will work towards maximising the positive impact of tourism communities, ensuring responsible development, accessible visitor experiences and far-reaching benefits for the wider economy. Particularly contributing towards the development and improvement of places and benefits to local communities. **As a destination, all partners will** support and uphold the key principles around championing the destination, sustainability, accessibility, partnership and collaboration.

[1] Destination Management is a process of leading, influencing and coordinating the management of all the aspects of a destination that contribute to the experience of visitors, taking into account their needs, and also those of local residents, businesses and the environment.

1.3 THE FIVE CHALLENGES

Five challenges have been identified to realise the ambition and aspirations of this DMP:

1.4 GROWTH TARGETS

The following ten targets will underpin this DMP, with supplementary targets also identified separately to track the success of Visit Essex. A technical annex supports these targets which will be reviewed after three years. Over the next five years, percentage change to UK GDP is forecast to increase a total of 7.8% with domestic demand forecast to grow by just 6.9%. So anything above 1.5% a year in terms of increasing tourism spending will represent a very good performance. This plan recognises that staying visitors should be the priority and also that inbound staying visitors offer a very real opportunity for Essex. The spending targets are not about growth in visitor numbers per se but rather about growth in value, implying a longer stay and/or higher spend.

Lift Value:

1. Increase the value of domestic tourism spending by 1.5% a year over the next 5 years generating an additional £67.8m and creating an additional 1,250 jobs
2. Increase the value of overseas tourism spending by 1.75% a year over the next 5 years generating an additional spend of £20.6 million and creating an additional 380 jobs
3. Change perceptions [2] – Increase the percentage of non-visitors who have considered visiting Essex for a short break from 29% in 2021 to 40% by 2028.

[2] *Have you ever considered visiting Essex for a Short break?* (2021) Destination Research – with 29% of a Sample of 952 agreeing.

4. Extend the season to increase sustainable usage, increasing the proportion of low season tourism by 2.3% to reach 46% of the total annual volume during the lifetime of this Plan.
5. Prioritise markets where there is room for Essex to grow – focus inbound activity on France, Netherlands and Germany and domestically create repeat visit opportunities for visitors who live in the West Midlands and the North West.

Support a Skilled Workforce and Productive Businesses:

6. Working with education and industry partners, develop a Visitor Economy Skills Pathway to encourage and support residents of Essex towards a job or career in the tourism and hospitality sectors.
7. Develop a Visitor Economy Entrepreneurs Fund to encourage and support 150 businesses in the tourism sector to increase productivity via investment in digitalisation, customer service training or other key priorities set out in this Plan.

Play our part to ensure Essex Thrives and Grows:

8. Increase Quality – Grow the quality of the visitor economy to include 90% of accommodation in the top quartile (up from 85%) and 80% of visitor attractions in the top quartile (up from 68.5%) measured on the basis of online reviews.
9. Champion Net Zero – Encourage 250 of the County's visitor economy businesses to become Champions and undertake activity to reduce their carbon footprint.
10. Champion Welcome All – Encourage 250 of the County's visitor economy businesses to sign up to a recognised accessibility scheme or undertake related activity.

2. INTRODUCTION

Great destinations are great places to live, work and study as well as to visit. A well-managed destination will create the environment for sustainable growth in the visitor economy, encouraging new investment and stimulating innovation, which in turn will lead to additional spend from visitors, new and stable value-added jobs and a focus on maximising the benefits of growth in the long term.

Destination Management is a process of co-ordinating the management of all the elements that make up a great visitor destination and the key aspects that contribute to a visitor's experience. This strategic approach takes account of the needs of visitors, local residents, businesses and the environment, and provides a blueprint to connect relevant strategies, approaches and stakeholders.

A Destination Management Plan (DMP) is a shared statement of intent to manage a destination over a stated period, identifying the key stakeholders, their roles, and responsibilities; the actions which must be taken, and the resources required.

The DMP is not the same as an organisation's or LVEP's own business plan, although closely related and where possible aligned. The priorities which emerge from developing the DMP will be shared across the destination and focus all activity in developing Essex as a tourism destination. Establishing a shared vision for the future of the visitor economy in Essex will bring key organisations and stakeholders together as they deliver against the key aspect of the Plan, examining in particular:

- Tourism performance and impacts
- Working structures and communication
- Overall appeal and appearance, access, infrastructure and visitor services
- Destination image, branding and promotion (marketing)
- Product mix – development needs and opportunities.

3. STRATEGIC FOUNDATIONS AND CONNECTIONS

3.1 STRATEGIC ALIGNMENT

There is widespread support in-principle by the public sector for the development of the visitor economy in Essex. It features across a range of policy documents at county, unitary and district levels and there is a complex overlay and relationship between different themes where tourism is often highlighted, including economic development, climate and net zero, rural regeneration, town centres, transport, skills development as well as further connections to more niche areas such as cycling and walking. There are also strong connections across some boroughs, expressed in joint documents such as The Association of South Essex Local Authorities Tourism, Leisure and Recreation Strategy 2020-2038.
The visitor economy offers a solution in terms of growth potential, new jobs and investment and as a positive catalyst to help reshape the way people perceive the County.

However despite this evident support, there is also a lot of change, with the role of the South East Local Economic Partnership being incorporated into Essex Country Council, political uncertainty with both upcoming local and national elections as well as relentless pressure on local authority budgets.

Several plans mention tourism as a force for local development and job creation. In Essex, the sector is generally treated as a serious element of the economy and one that can further the broader development goals of the county, its districts and destinations while also contributing positively to other agendas. Generally, Essex is ahead of many other counties in this regard but more connections focussed on implementation across different parts of the public sector would be beneficial.

Emphasis on tourism is dependent on the current scale and likely potential of the industry and this varies by District. The Table overleaf shows the alignment of some of the key Strategies with green shades showing the greatest connection to the visitor economy and this Plan.

Date	Title	Plan Aim
2024	Delivering for North Essex *	A productive North Essex that advances its economic potential
2023	Cultural Strategy	Enrich, empower, amplify and grow the sector / film locations
2023	Sustainable Growth Delivery Plan	Report relating to delivery of Everyone's Essex
2023	National Landscape Management Plan	Fulfils statutory duty to set out a vision for management of NL
2020	Green Infrastructure Strategy	Enhance, protect and create high quality green infrastructure
2021	Walking Strategy	Develop coherent walking networks across the county
2016	Rural Strategy	A healthy prosperous and connected rural Essex
2010	Integrated County Strategy	A shared and agreed vision for Greater Essex
2023	Extraordinary Essex	Making Essex stand out and compete for global business
2011	Transport Plan (LTP_3)	To support sustainable economic growth and best quality of life
2023	Climate Action Plan v2	A High Quality Environment
2023	A Wilder Essex - Essex Wildlife Trust	Restore, Take action and Thrive
2022	Skills Plan	Equipping employers, adults and young people with the skills require
2021	Everyone's Essex	Levelling up the County
2023	Local Skills & Improvement Plan	An employer led articulation of local skills priorities - six sectors
	* Similar plan in progress for South Essex	

The Visitor Economy can contribute significantly to the Levelling Up agenda and be a driver for positive change in destinations like Clacton. In general, greater connection between this Plan and the Levelling up agenda including skills and workforce development will be needed. The current LSIP could benefit the industry by supporting visitor economy related training and skills development. Annex I gives more detail of how this Plan's priorities fits to these wider strategies. Most of the plans are well aligned other than the current Local Skills and Improvement Plan which does not recognise the sector as one of its six priorities. This may be because of an employer-led focus around the manufacturing and construction sectors.

3.2 Connecting Tourism Strategies with Local Plans

Planning policies invariably note the importance of the sector and Local Plans are generally supportive of the visitor economy, subject to developments meeting criteria to protect environmental assets, restrict development in designated areas such as Green Belt and ensuring the maintenance of the cultural and heritage fabric. There is not an issue with high visitor numbers or congestion across the whole the County although some destinations (such as Dedham and Mersea) may experience elevated visitor volumes at peak times.

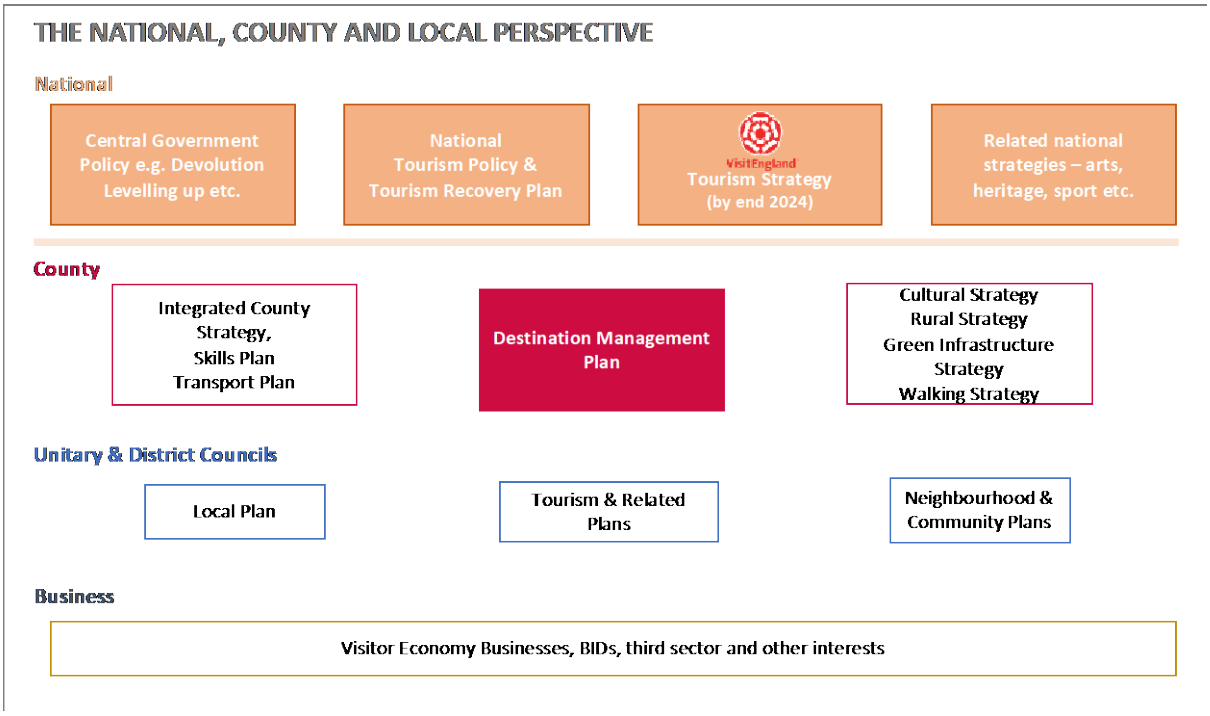
In general, there would be merit in better linking the tourism related Local Plan policies and District tourism strategies. The latter are usually ambitious and marketing focussed. Given the limited budgets available it is not always clear whether this promotional work is really moving the dial. Typically, tourism strategies have a broad aim to grow the visitor economy, often expressed by somewhat unrealistic high-level targets that are not connected to their respective Local Plans, nor are easily measurable. Typically spending increases may be measured in nominal terms rather than real terms and this combines with an unhelpful focus on growth, seemingly at any price, over many other metrics that tourism can also help with, such as the development of local supply chains, community engagement, protection of natural resources and so forth. In general, profile raising and promotional activity is front and centre with infrastructure and product development also featured. Activity around place, welcome, workforce and public realm is often less of a priority but may be picked up in other strategies.

Many of the tourism plans have detailed schedules by theme of activities, but it is not always clear about what has been done, what connections are being made to other nearby areas, or the potential economies of scale derived from working across Districts. Responsibilities for delivery may not be clear or are down to a lot of different partners with no clear lead. Generally, priorities may also be unclear, as are how actions are being resourced, what level of funding is being applied and what later results are achieved. Greater clarity in all these areas is likely to aid effectiveness.

The visitor economy has very real potential in Essex but currently the public sector is not connected well enough together to make the best of it. This is no criticism as it is difficult and in many respects Essex is performing well. The number of districts and unitary authorities in Essex however means there is high potential to deliver greater levels of effectiveness than many other counties providing robust connections and common priorities are developed.

This is particularly the case to deliver policy areas such as levelling up. The visitor economy can offer opportunity to those areas of the County that are more deprived as it offers entry-level positions and is a large job creator that can play its part in upskilling the workforce to become more productive. The challenge is the sector's micro-based and atomised structure which makes the potential more challenging to deliver when compared with, say, one large manufacturing site.

A strong mutually reinforcing partnership working across the local government network could help transform a currently good performance into a great performance. By aligning both marketing and development, the message will be stronger and the spotlight on specific areas and their USPs more effective. There will be important pockets of expertise across the county that can help develop this next stage. The graphic below shows how the national, county and local policy frameworks can be connected in support of the industry.



Opportunities which are connected to the Leadership priority:

1. Draw together a team who can take a strategic view on what is being done across all levels of local government relating to the visitor economy in the County.
2. Develop a matrix showing current themes, activities and targets that are currently being delivered and assess what has been done, what has worked well and draw lessons from what has not worked as originally expected.
3. For those areas where real progress has been made allocate a point person to lead on that area for the County as a whole.
4. Draw together a plan for collective action that has a maximum of three priorities and ten actions and develop a related funding proposal. This should form part of the DMP Action Plan.

3.3 Who does What?

Annex III shows the typical set of roles and actions that are delivered by both public and private sectors in favour of the visitor economy. A number of these functions are directly connected and demand close collaboration, such as marketing and promotion. Other functions represent important underpinnings for a successful visitor economy or may form part of a chain of activity that delivers major improvement against the five Challenges identified. Detail is set out in the draft Action Plan.

4. THE VALUE OF TOURISM

4.1 NATIONAL: THE STRATEGIC IMPORTANCE OF TOURISM – THE NEXT FIVE YEARS

Tourism is a significant economic, cultural, and social asset to the UK. The sector is a powerful engine for economic growth and job creation throughout every nation and region. Tourism contributes not only economically, but also in creating pride in local communities, and in building the UK's global reputation, showcasing the best of the UK to the world and contributing to the UK's soft power.

Before the pandemic, in 2019, tourism contributed nearly £74 billion to the UK economy (4% of the UK's total Gross Value Added (GVA)). The sector directly supported 1.7 million jobs, employed a higher-than-average proportion of women and young people, and supported over 230,000 Small and Medium-sized Enterprises.

COVID-19 was hugely disruptive for the sector. The tourism direct GVA for 2020 was £27bn (a loss of 64% compared to its GVA contribution in 2019).

The Government's Tourism Recovery Plan[3] continues to focus on:

- Recovering inbound and domestic overnight volume and value.
- Spreading the benefits of recovery across the UK, encouraging visitors to stay longer.
- Investment in tourism products and transport infrastructure.
- Maximising technology and intelligence to stimulate innovation, increase resilience and enhance the visitor experience.

This is underpinned by the recognition of the need for more year-round quality jobs, the need to minimise the negative impact of tourism and ensure that the visitor offer is inclusive and accessible. In addition, the Tourism Recovery Plan is focused on the UK being a leading European nation for hosting business events.

The world has moved on significantly. The Government's Tourism Recovery Plan set a target of recovering inbound tourism by the end of 2023, this target has been reassessed given the continued challenges to international travel over the course of 2021 and 2022: the government's aim is now to recover 2019 levels of inbound visitors and spend by the end of 2024. Visit Britain's estimate for the full year 2023 is 37.8 million inbound visits to the UK with a spend of £31.7 billion; this would set a record for spending, at least in nominal terms.

[3] https://www.gov.uk/government/publications/tourism-recovery-plan

This Plan is set in the context of recovery, the current cost of living crisis and the elevated cost of doing business.

4.2 Inbound Regional Performance

The International Passenger Survey recorded 2.1 million overseas visits to the East of England in 2022 of which Essex receives 23%. The Region is showing good recovery post-COVID, particularly in terms of overseas spending which in 2022 was just 1% less than 2019. Number of visits to the East of England are still 10% below pre-COVID levels, but the Region has shown faster recovery than England as a whole, which received 23% fewer visits in 2022 than 2019. See below for Essex inbound data.

4.3 County and District Level

Inbound Visits to Essex

Essex received 485,000 overseas staying visits, spending £231m in 2022[4]. While numbers have not yet fully recovered to pre-COVID (2019) levels, visits are equal to those seen in 2018 and spending, although higher than 2018, is still down 15% on 2019 levels. The Top 20 inbound markets for 2023 are shown in the Table. These markets account for 82% of total inbound visitors to Essex with the share shown. The column on the right shows how Essex is performing relative to England. A minus number signifies that Essex is under-performing England, a positive number means that the County is out-performing. Russia is significantly over-represented where these may be longer term visitors. Other countries which over-index include Spain and Australia. The flows from Spain may be reflecting some UK ex-pat movement. Essex is somewhat under-represented in terms of France, USA, Italy and the Netherlands. The relatively poor showing of Ireland is likely to be largely geographic, as the North West generally receives a high proportion of VFR traffic from Ireland. There is real potential to raise the value of overseas tourism given the type and varied nature of the accommodation offer.

Top 20 Overseas Markets

Country	% Share	ESSEX v. ENG
USA	14.1%	-3.5%
ESP	11.2%	3.4%
DEU	8.7%	0.1%
FRA	6.5%	-4.4%
RUS	5.2%	5.1%
AUS	4.8%	2.0%
NLD	4.8%	-1.5%
CAN	3.7%	0.2%
ITA	3.4%	-1.7%
SAU /QAT	3.3%	2.8%
KOR	2.7%	2.7%
IRL	2.3%	-7.4%
IND	1.8%	-0.1%
JPN	1.8%	1.4%
ARE	1.7%	1.7%
ROU	1.3%	-1.1%
TUR	1.3%	0.7%
BRA	1.2%	0.2%
JAM	1.2%	No IPS data
PAK	1.1%	1.0%

Tomorrow's Tourism / Essex County Council
ONS (2023) International Passenger Survey

[4] Sources: VisitBritain (2023) International Passenger Survey and Tomorrow's Tourism Ltd.. Table reports mobile phone data analysed as part of the Market Review and assessed against national norms.

Domestic Overnight Visits

The County is ranked 16th in domestic tourism visits and 18th in overnight spending respectively, out of 48 in the national league table. This reflects well on Essex's offer, suggesting that the quantity and type of attractions and serviced accommodation is appropriate to the market. (By way of comparison, many destinations have far more day visits as a proportion of total visits).

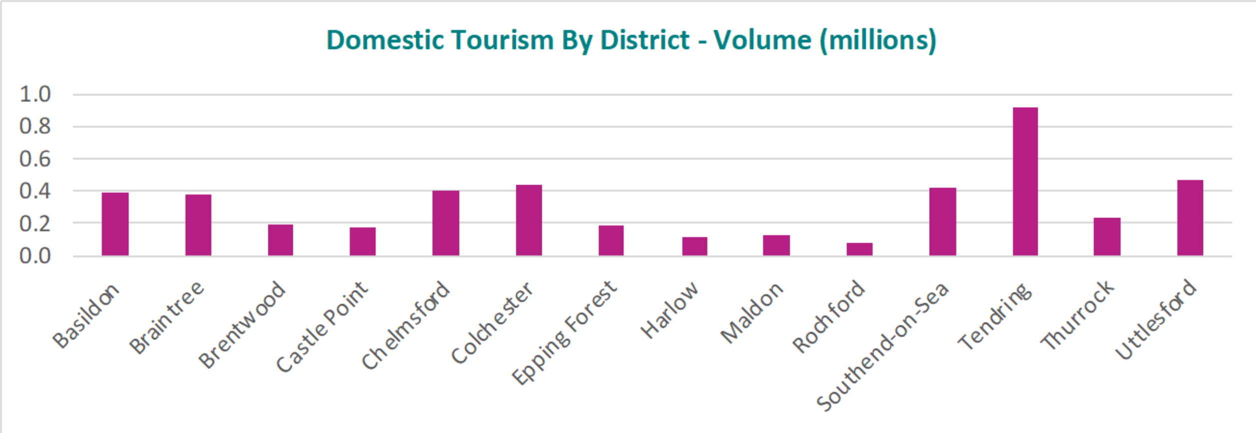
Essex Annual Visits, Nights and Spending 2021-2022				
	Visits (m)	**Nights (m)**	**Spend (m)**	**Spend (%)**
Domestic Staying Visits	4.5	12.8	868	29%
Domestic Day Visits	55.7		1846.7	63%
Total Domestic Visits	60.2	12.8	2714.5	92%
Inbound Visits	0.485	3.4	231	8%
TOTAL	**60.7**	**16.2**	**2945.8**	

The Table above does not report economic impact but rather the volume of annual visitors derived from the main national surveys. Considering indirect and other impacts means the total value of the industry is some £3.3 billion.[5]

As far as individual Districts go, the chart below shows the breakdown.[6] It is likely that the high volume of visitors to Tendring reflects its significant accommodation stock numbers which are three times higher than other Districts in the County. Holiday Parks are an important part of the offer, particularly in the east of the County, with over 3,000 rooms available. The nights spent in Braintree are higher than other Districts apart from Tendring and Uttlesford (possibly Stanstead related) and this may also apply to Braintree. Despite these hotels often being outbound related, they are still supporting jobs and income for the Essex visitor economy. The airport and hotels can also be key partners to help deliver the inbound growth target given earlier.

[5] Destination Research (2022) Economic Impact of Tourism Essex 2022

[6] District level numbers need to be treated with caution and are indicative only as they are based on small sample sizes so the margin of error could be +/-30% on either side at 95% confidence levels. The statistics are drawn from the Great Britain Tourism Survey which is ONS approved.



Domestic Day Visits

Colchester and Chelmsford receive a high proportion of Essex's domestic day visits, followed by Thurrock, Southend-on-Sea, Basildon, Braintree and Tendring (in order of volume). Day visit spend in Thurrock is £342m a year, higher than any other District, due to Lakeside, one of the largest shopping centres in the UK. Together with Colchester and Chelmsford, the three boroughs account for half of all day visitor spending in Essex.

4.4 ORIGIN OF VISITORS

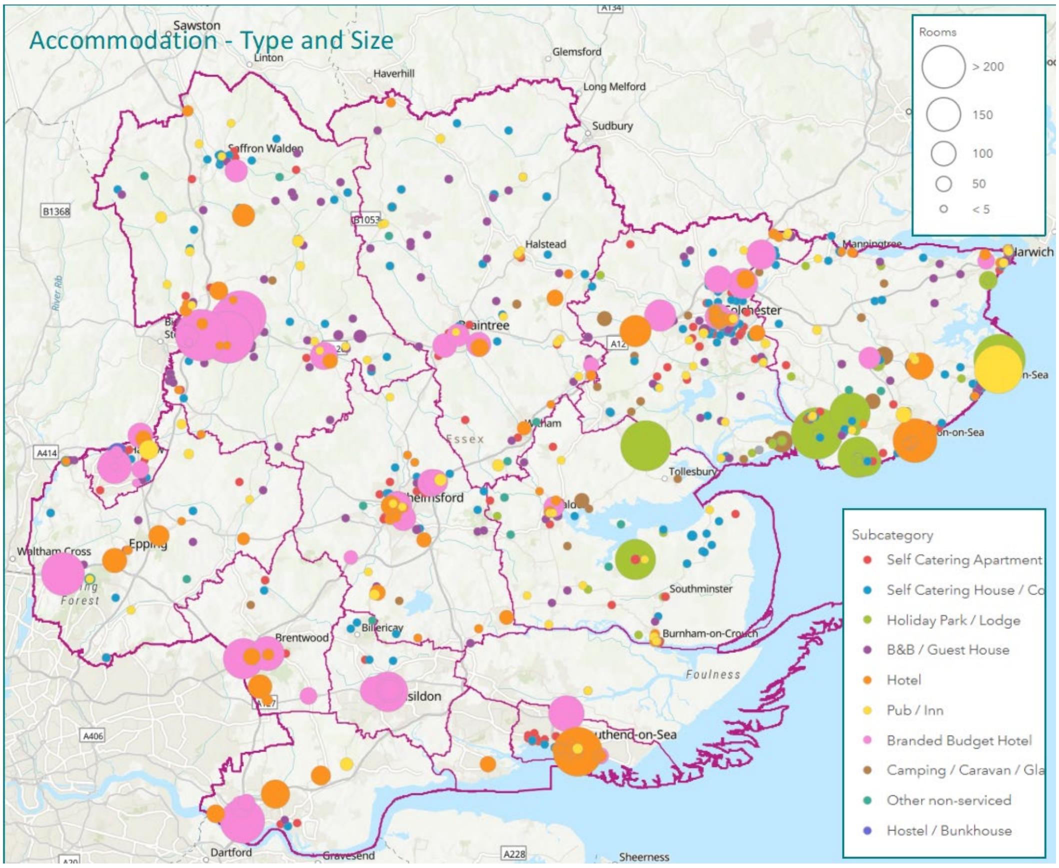
Some 75% of visits come from people living within 20 miles and are residents / day visitors rather than overnight visitors. This is a function of a high population together with a high relatively local catchment in Greater London. Essex draws from a wide catchment including SE England, the West Midlands and the North – see Annex II. The Annex shows flows particularly from main centres of population but only a little over 4.1% of visitors are travelling from over 100 miles away or from overseas. Usually these visitors will be staying, either with friends & relatives on in commercial accommodation. As far as specific markets from outside of the County the table in Annex II identifies that half of all visitors come from 25 local authority areas that have a high affinity with Essex. Windsor and Maidenhead is of particular interest given that it is further away than many of the other regional markets.

5. DESTINATION AUDIT AND CURRENT TRENDS

An audit of the County resulted in well over 5,000 assets, covering accommodation, attractions, food and drink, and festivals and events.

5.1 ACCOMMODATION

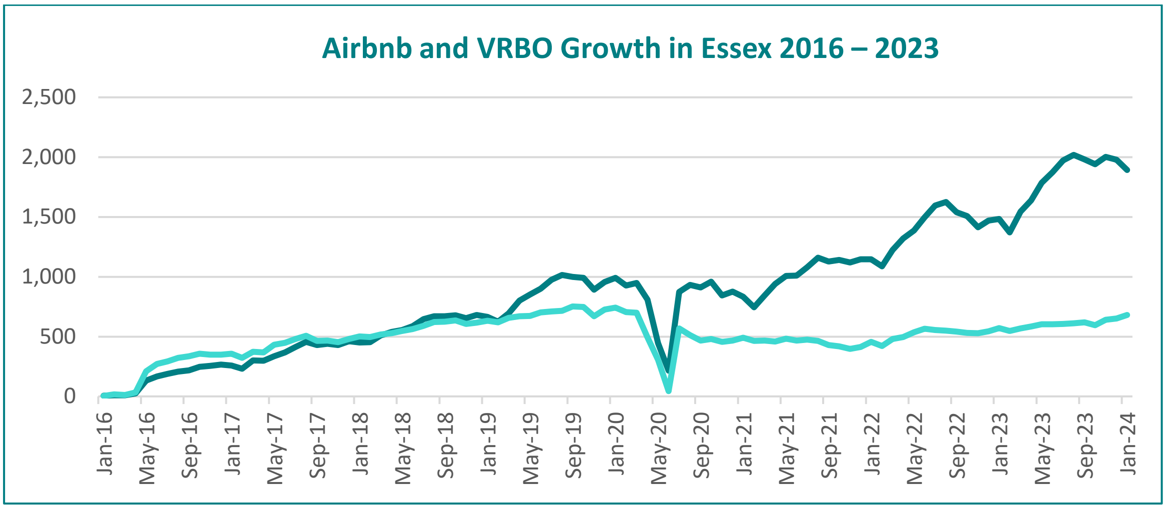
The accommodation sector is particularly buoyant when compared to many other counties with over 1,000 properties, 38% of which are serviced establishments taking advantage of both the London catchment and key cities and towns. There is a predominance of self-catering properties in the east of the county, and clusters of branded budget hotels in the west with locations particularly relating to Stansted Airport and around Epping Forest. Accommodation is of a high standard with 86% of properties sampled placed in the Top quartile and 11% in the second quartile, significantly outperforming many other counties.[7]



The Sharing Economy has grown significantly in importance since 2016 as the chart below shows. That growth has resulted in some 2,500 establishments operating in the county in January 2024. The sector is highly dynamic in that many operators are not always available

[7] Quality scores relate to 513 accommodation properties across the County derived from Booking.com ratings in January 2024. Compared with two other counties where Quartile 1 scores are significantly lower.

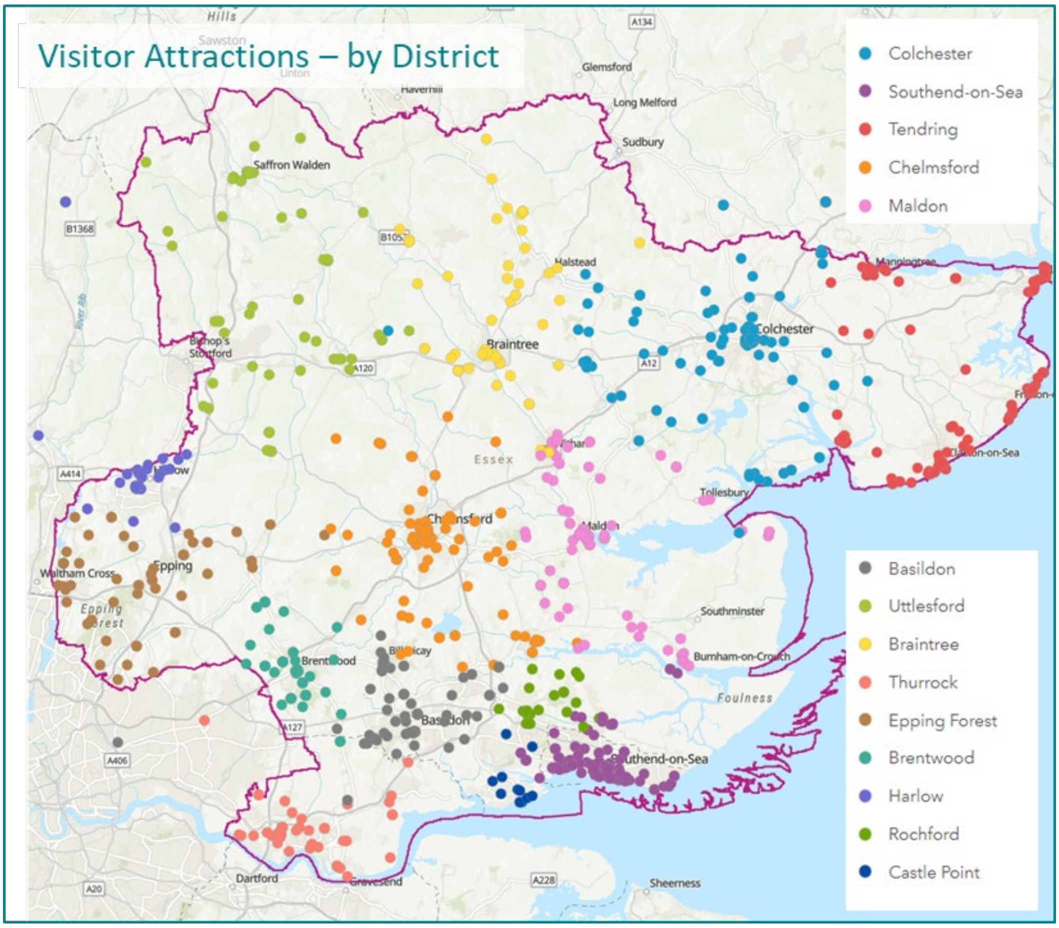
for letting or have confirmed reservations. The sharing economy in Essex is largely complementary to the tourism economy and the County has a good balance of different property types. Average room size is small at 1.8 rooms per property.



5.2 VISITOR ATTRACTIONS

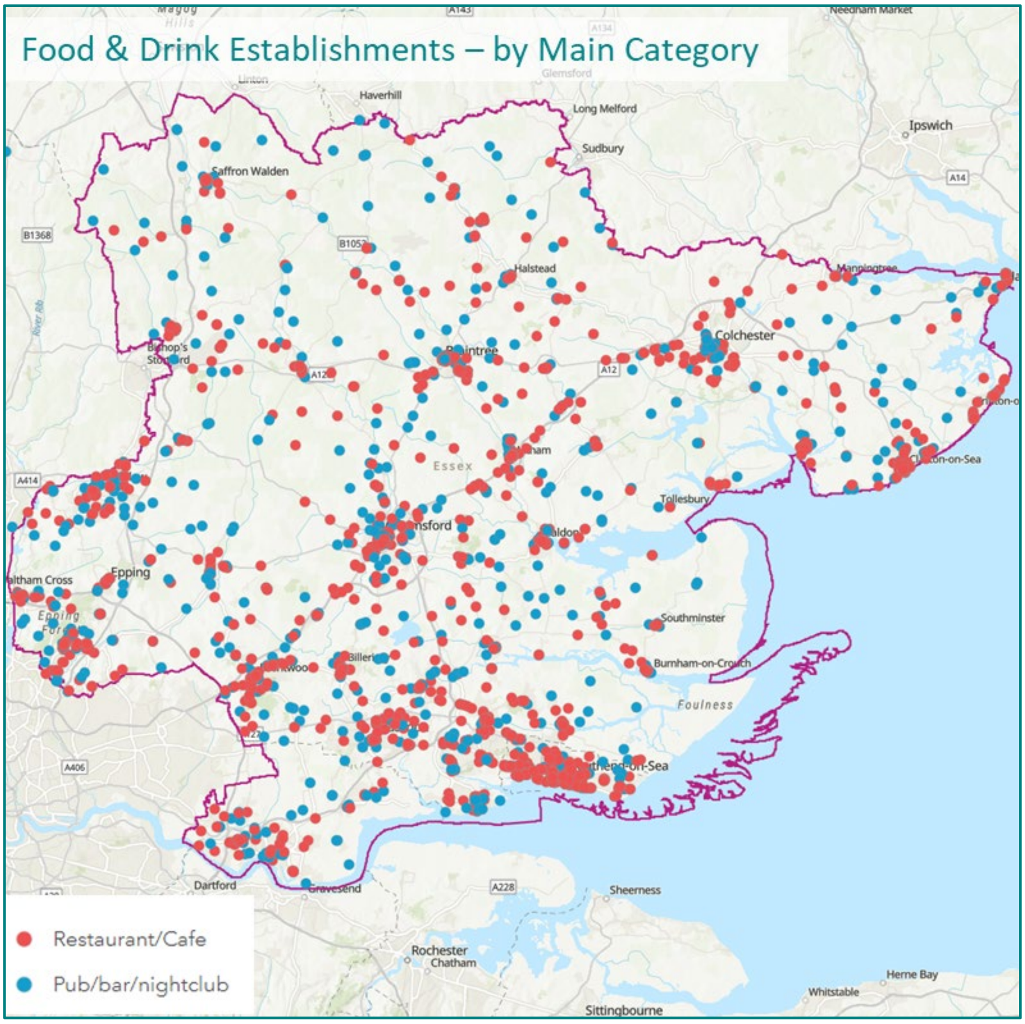
A diverse set of visitor attractions underpins a strong leisure tourism offer, with over 1,000 visitor attractions in Essex. Experiences dominate the sector. This includes entertainment for children, trampoline parks, escape rooms and bingo, amongst others. In general, the experiences sector is well developed compared with other counties.

The area also has a rich 'traditional' attractions stock of historic properties, gardens and museums, art galleries and theatres. Equally there is an important collection of country parks and green areas, which include numerous nature reserves. Specialist retail, golf clubs, and sports venues are also popular. Spectator sports and venues are likely to remain important in terms of visitor numbers and spend. There is a good mix of indoor and outdoor options. This means a seasonal offer that can support the shoulder or off-season markets.



5.3 FOOD & DRINK

Restaurants and cafés dominate the food offer, making up over 70% of the 2,843 establishments recorded by the Food Standards Agency. As would be expected the distribution of restaurants, cafés, pubs and nightclubs is more uniform across the study area with population centres seeing greater numbers, shown particularly in Southend-on-Sea, Chelmsford and Colchester. As a broad overall estimate, some 20% of spending in restaurants and cafés is likely to be related to visitor spending, but some cafés and pubs will be much more reliant on visitor income depending on their location. Essex boasts nine Michelin Star restaurants, and when measured using FSA ratings, the quality of the food and drink offer is generally high.



5.4 Festivals and events

Festivals and events are an important component of Essex's visitor economy. In 2024, there are at least 470 events of various different types planned in the County. Festivals and events are distributed across the study area with a pronounced nucleus in the urban centres.

5.5 Current Trends

Until the pandemic, the UK population saw holidays as a right not a privilege, this was driven by technology and digital advancements, low-cost airlines and social media. However, whilst the UK is recovering from the impact of the pandemic, there are several new challenges which impact travel habits.

The cost of living has put pressure on the pockets of consumers and affects their holiday habits. The Visit Britain Consumer Tracker currently reports:

- 76% of those surveyed in March 2024 intend to take an overnight domestic trip over the next 12 months (compared with 73% in March 2023).
- The top barrier to taking an overnight domestic trip is ‘the rising cost of living’ (33%) followed by UK weather (32%) and ‘personal finances’ (27%).
- 21% took an overnight UK short break or holiday between October-December 2023, +1% on the same period in 2022.

Barclays Consumer Spending Report states that growth in the overall travel sector increased by 9.3% in February 2024 compared with February 2023. 73% of consumers say they will take a holiday in 2024, with holidays abroad remaining a priority for many.

In addition, leisure and business travellers are now giving much more thought to their carbon output when travelling, with many looking to businesses who will support them in helping to reduce their impact. Generation Z value sustainable travel and authentic experiences.

In contemporary travel trends, Generation Z emerges as a significant demographic with a strong inclination towards sustainable practices and authentic experiences. Surveys indicate that a substantial majority of Gen Z travellers prioritise sustainability when planning their trips, with 80% considering it an important factor, surpassing other age groups (Booking.com's Sustainable Travel Report, 2023). They exhibit a preference for unique and culturally immersive experiences, as evidenced by their inclination towards off-the-beaten-path destinations, with 67% prioritising authenticity in their travel choices (Skift's Global Travel Tracker Survey).

Travellers are increasingly taking action to make sustainable choices whilst on holiday, such as choosing to walk, bike or use public transport, and buying local, and travelling outside of peak season to avoid overcrowding. Regenerative travel is also increasingly popular, with travellers seeking to ensure the money they spend goes back to the local community in some way.

The wish for many to travel sustainably is often ahead of what actually happens in practice as the reality of travelling on the train or bus, especially as a family with luggage, is more challenging than taking a car. However Essex has some inherent advantages in being at the vanguard of encouraging more sustainable travel, both for day and staying visits. Its position to a huge and relatively local London market and good rail connections can be a firm basis on which to begin activity. That will include the development of a carbon baseline to be able to track progress, inclusion of travel choices in campaigns and industry net-zero activity in support. Such activity should be recognised and included in Local Transport Plan 4.

Technology, including AR and VR, social media influence and ease of booking is more important. Social media plays a significant role in shaping their travel choices, with Gen Z often seeking out destinations portrayed as genuine, culturally rich and where they feel they can find 'live like a local' experiences. Their heightened environmental awareness translates into a preference for eco-friendly accommodations, travel modes and activities, reflected in the rise in bookings for such options (Airbnb and Expedia booking data). Moreover, they tend to support businesses and destinations that demonstrate social responsibility and respect for local communities. This demand for ethical tourism is influencing the industry, leading to an increase in sustainable travel options and initiatives aimed at preserving cultural heritage and supporting community benefit. Through their preferences, Generation Z is driving a shift towards more sustainable and authentic travel experiences.

Holiday and travel expectations are also changing. Travel is seen as ageless and consumers are looking for more opportunities for all the family, all abilities and generations, to be able to share experiences – and importantly, authentic / real experiences. Active outdoor, wellness and health tourism is coming increasingly of interest, as are opportunities for visitors to volunteer or take part in self-improvement activities.

Add in the national commitment to accessible and inclusive tourism and the potential for it to drive the economy - according to VisitEngland, 430,000 British people with an impairment did not take a trip in 2018 due to an accessibility concern. This results in an opportunity worth £116.7 million for accessible transport and tourism businesses in the UK.

5.6 EMERGING TRENDS

- Experiences for travellers who want to undergo a significant personal or spiritual transformation or immerse themselves in nature to enhance physical, mental, and emotional well-being. This can also extend to those who want to spend their holidays off-grid, sleeping and living in the great outdoors (glamping and camping) or "ecotours" to enjoy holidays while learning about environmental and sustainability issues in a particular location; as well as empowering local communities to take a lead in areas like travel and tourism.

- Digital Innovation: The use of technology, such as mobile apps, augmented reality and virtual reality, has been on the rise to enhance the overall travel experience, providing interactive guides and immersive content.

- Artificial Intelligence (AI) will rapidly make impacts into the visitor economy with opportunities relating to market research, such as visitor sentiment analysis; travel and tour planning; visitor / consumer data and more personalised marketing. It will help to replace tasks that are currently text driven, increase efficiencies and enable staff to be both better informed and improve customer service. The businesses that harness the opportunity will increase in power and influence relative to those that do not. These benefits are likely to be apparent during the lifetime of this Plan.

- New remote working arrangements has led to an increase in secret trips taken by employees without their employer's knowledge, as has the trend of business travellers tacking on leisure time to the end of business trips. In addition, working from home has led to many rediscovering their local area.

- Film and TV exposure has increased visits to destinations primarily because they were featured in a popular movie, TV show, or book.

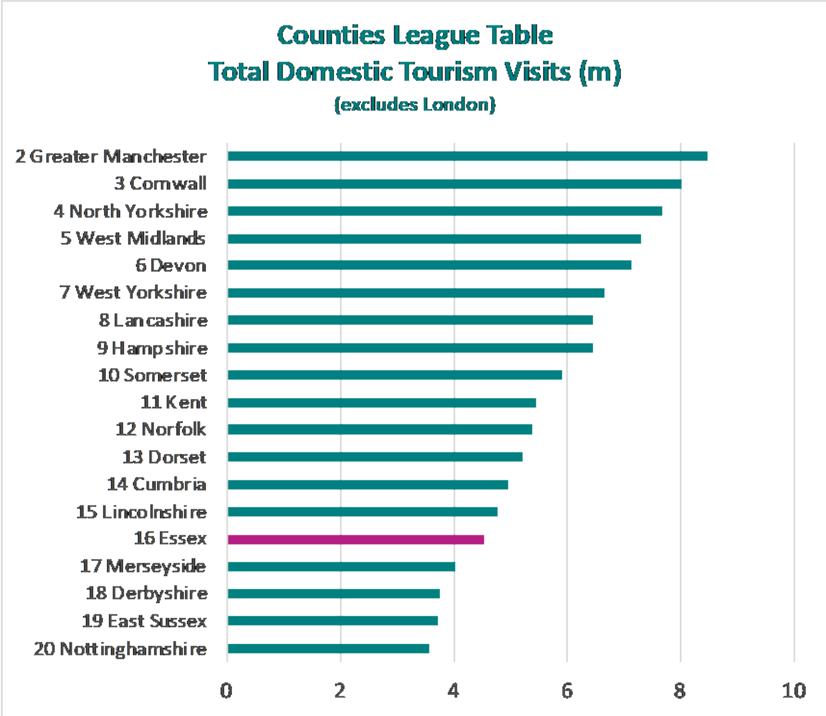
- Budget holidays (camping, self-catering, and all-inclusive holidays) and hiring equipment rather than buying, remain popular, conversely, so do experiences offer the best of everything. Shorter getaways and staycations have become popular, allowing people to explore nearby destinations without the need for extensive travel.

- Families making up for lost time with "reunion" or "celebration" travel; and groups of Gen Z-ers who want to get together on a trip to celebrate birthdays, graduations, and other milestones.

- Food and drink experiences have become a significant part of tourism. Visitors often seek out local and authentic culinary experiences, exploring regional dishes and specialties.

The potentially most significant disruptor of the sector since the launch of the internet is the rapid acceleration of Artificial Intelligence and its application across the visitor economy; impacting on Visitor Information and customer service, as well as inspiring people to visit and providing personalised services and suggestions during their visit. As technology continues to advance, we can expect further innovations that will shape the future of travel.

Essex currently stands at a pivotal moment, having achieved Local Visitor Economy Partnership accreditation from VisitEngland and initiating the DMP planning process in collaboration with stakeholders. Effective planning and execution, especially through partnership working, holds significant potential to drive economic growth while aligning with local and national tourism priorities. Baseline research positions Essex as a notable player, ranking 16th nationally alongside destinations like Cumbria at 14th. The Table below shows where Essex sits against its peer group.



Furthermore, our analysis of the accommodation offer indicates that Essex surpasses the national average, particularly in serviced accommodation, signalling a more balanced economy than many others, with untapped potential. Additionally, Essex boasts a diverse range of attractions, from historic landmarks to scenic landscapes and coastal vistas, complemented by a growing food and drink scene. Situated advantageously in terms of location and connectivity, Essex presents itself as an ideal base for visitors.
exploring London, Cambridge, and nearby regions. Essex is fairly unique in having four international gateways (2 airports and 2 ports) and the potential opportunities that these present have not been fully realised.

However, despite these assets, Essex faces various challenges hindering the realisation of its full tourism potential. Its proximity to London presents both advantages and disadvantages, as it struggles to compete with the capital's draw while offering something distinct within its geographical positioning. This Destination Management Plan developed in collaboration with committed tourism stakeholders, harnesses the potential to maximise and mobilise Essex's potential. Through local ownership and targeted strategies, we aim to harness local energy and opportunities while addressing the challenges hindering the destination's growth.

6. The Five Challenges in Detail

Through analysis of our research findings and engagement with stakeholders, we have identified five priority areas for Essex's tourism development. Considering the challenges, issues, and opportunities associated with each priority area, we have identified strategic themes and associated actions to prioritise.

6.1 Leadership, Collaboration And Partnership

Essex faces challenges due to fragmentation and duplication across the county, with various public and private sector organisations working in silos on projects which are of benefit to the development of the visitor economy. Visit Essex is impeded by the absence of commitment to a centralised resource for destination management, product development and marketing. This issue is compounded by limited resources, budgetary constraints and a lack of cohesive strategy, leading to fragmented operations and internal competition among stakeholders.

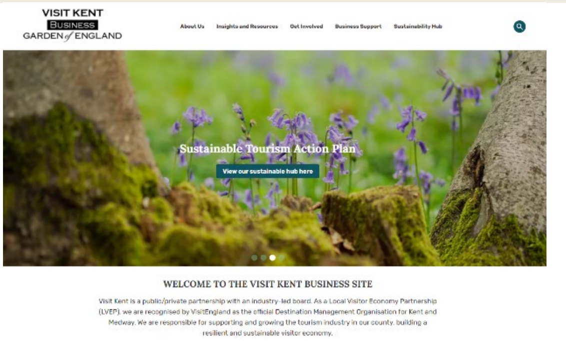
Limited data and insight can constrain the potential for informed decision-making with many areas of activity affected. The comprehensive geo-located asset audit undertaken as part of this Plan will inform Council departments of the extent and nature of the supply side and a related online app is available at this *link*. Generally there is a strong read-across from broader Essex strategies to this Destination Management Plan but in order to meet the Growth Targets it is advised that this linkage is formalised with working groups, funding and other mechanisms to build further connections, particularly in relation to increasing spending, improving skills pathways and boosting business productivity.

Opportunities for leadership, collaboration, and partnership

- Increase cross-County working: Establish and resource a group to implement its priority options. Identify areas of duplication and fragmentation and plans to move this forward to mitigate negative impacts.
- Organise a round-table session with planning colleagues and industry to explore and action potential improvements.
- Update planning policy to better reflect today's visitor economy.

- Develop a transport partnership with transport providers to retain visits considering sustainable and active connectivity.
- Publish the Destination Management Plan and hold a related conference.
- Working with schools, colleges and universities establish a youth panel or ambassador to steer and support delivery of the DMP.
- Improve data collection and use of data to focus activities.
- Establish data and evidence baselines regarding the sectors performance and economic impact studies to support funding bids and partnership opportunities.
- Agree the most appropriate delivery model and a three-year funding envelope.
- Create a champion programme.
- Identify networking groups and leads for each group.
- Prepare a ‘key facts/calling card’ for the visitor economy for partners to use.

Destination comparison: Leadership (Visit Kent)

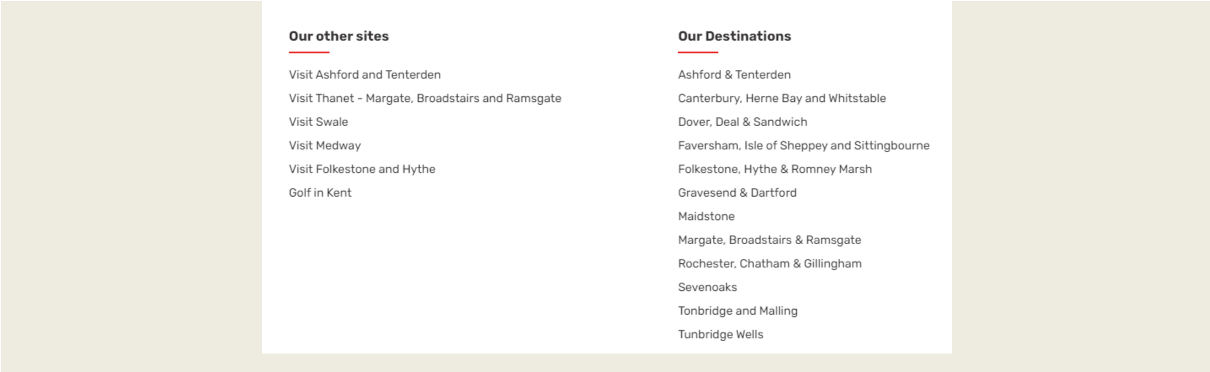


Visit Kent is a public/private partnership with an industry-led board; a Local Visitor Economy Partnership (LVEP), the official Destination Management Organisation for Kent and Medway. Visit Kent lead on supporting and growing the tourism industry, building a resilient and sustainable visitor economy. Visit Kent is also recognised by Kent County Council and Medway Council, the 12 district councils and the South East LEP as the lead organisation for the visitor economy and tourism industry in Kent and Medway.

Visit Kent developed a public/private collaborative approach which brings together Kent County Council, Medway Council, the District and Borough Councils and leading private sector businesses. This means strong political support and leads to a cohesive business base from across the visitor economy working together with Visit Kent. The outcome of this sees reduced duplication and a joined-up vision, resulting in joint bids, innovative marketing and initiatives focused at the local population, such as the ‘Big Weekend’.

Visit Kent also leads on place making for the county, and through clear brand strategies, has embedded the importance of tourism in planning, regeneration, and economic development strategies. This includes a proactive role in securing hotel investment, growing the cultural offer and destination infrastructure improvements.

Visit Kent is the focal point for businesses and partners, offering business advice, subsidised training courses, business barometers, peer benchmarking and networking events.
Kent has a strong identity which is built on its heritage, its iconic coastline, quality local produce and a vibrant culture. Tourism contributes £4.1 billion to the Kent economy and supports more than 81,458 jobs.



6.2 PLACE, BUSINESS AND PRODUCT DEVELOPMENT

There is limited connection in rural areas and a disconnect between national heritage organisations; communication between businesses can be poor and there is a lack of focus on the strategic vision for Essex.

Planning rules and regulations are impacting on business development and growth, and this is further hindered by the lack of shared strategic direction at district and county level. It is also perceived that there is a lack of overnight accommodation, however, without a joined up approach to an accommodation assessment of the county it is difficult to quantify this. Compared with Buckinghamshire, Essex has a similar serviced accommodation stock but hugely outperforms on spend. Average occupancy for the region (East of England) is also 4% higher[8]. Essex is more efficient and higher yield as it has a greater number of larger serviced establishments (in the cities, at Stansted Airport and around the London borders. The evidence suggests potential demand for new and additional serviced accommodation establishments, providing they are of the right type and in appropriate locations.

Lack of inward investment, the lack of ‘town retail’ and a North/South divide are perceived as issues to be tackled; particularly when linked to town centre regeneration, visitor welcome and offer, local inward investment plans and local politics.

Transport issues, including accessibility concerns, inadequate parking facilities and underdev eloped cycling infrastructure, hinder visitor mobility. Furthermore, the lack of cohesive messaging and connectivity between attractions and market towns could be limiting the experience for visitors.

Transport issues are difficult for residents let alone visitors. This particularly impacts on travel to and from work, particularly in rural areas. Transport from North to South and West

[8] VisitEngland / STR - England Occupancy Survey, January 2024

to East are poor, this includes problems with Bus routes (not direct), and rail, road (A12) issues. Road works, road closures, weekend engineering, poor road surfaces and lighting should be tackled.

Signage is lacking and brown signage is inconsistent and not well maintained, which has an impact on visitors to the area. Parking is expensive, there does not appear to be enough in key areas and overzealous parking attendants do not offer the best welcome. Poor cycling infrastructure: the current offer is not linked and there is a lack of ownership. The waterways network is not developed or connected – and the concept of very light rail opportunities to connect to the main line.

Towns and cities lack attention in terms of public realm and street cleaning and a focus on what is a standard across the county is needed. Insufficient electric car charging points; the cost is prohibitive in many areas. There is a lack of data and research to make informed decisions to support development.

It has been highlighted that there is a need to develop attractors and attractions; and to have clarity over the offer for Essex rather than mixed messages. Essex relies heavily domestic tourism but has the potential to attract international visitors too, with the development of appropriate experiences and products linked to unique Essex landscapes and attractions. However, the lack of data-driven and evidence-based decision-making and planning restrictions is holding back, rather than inspiring, product development.

The Visit Essex website needs to include searchable, bookable product. The leisure offer is seen as expensive and days out are not effectively positioned for visitors and local residents alike – there is a lack of connectivity between attractions, market towns and coastal destinations. Coaches are seen leaving the county rather than arriving, as the offer is not there for coach visits, it is not joined up or attractive. There is an over-riding perception of Essex as a Drive-through destination.

Strategic planning does not give private sector providers the confidence or ability to maintain their operations in shoulder and low seasons. Engagement with business is not optimised and needs to be improved to encourage development and growth for both businesses and the economy.

Rather than being proud about its boldness, it is felt that Essex is reticent to use its personality and strong spirit as a positive factor; this also leads to a lack of Civic Pride and the internal perception that externally Essex has a poor reputation, and therefore, a negative brand.

Opportunities for business development

- Establish a new private sector-led group to champion the priorities of the DMP and a wider Tourism Forum.
- Distribute more products through the inbound travel trade and develop the offer for international visitors.
- Communicate and encourage best practice across the Essex visitor economy to increase sector professionalism and improve the quality of the product, offer and service delivery.
- Boost the festival and events sector, identify investable opportunities, particularly those relating to food and drink.
- Linkages between offer product and audiences established to form clusters.

Opportunities for place development

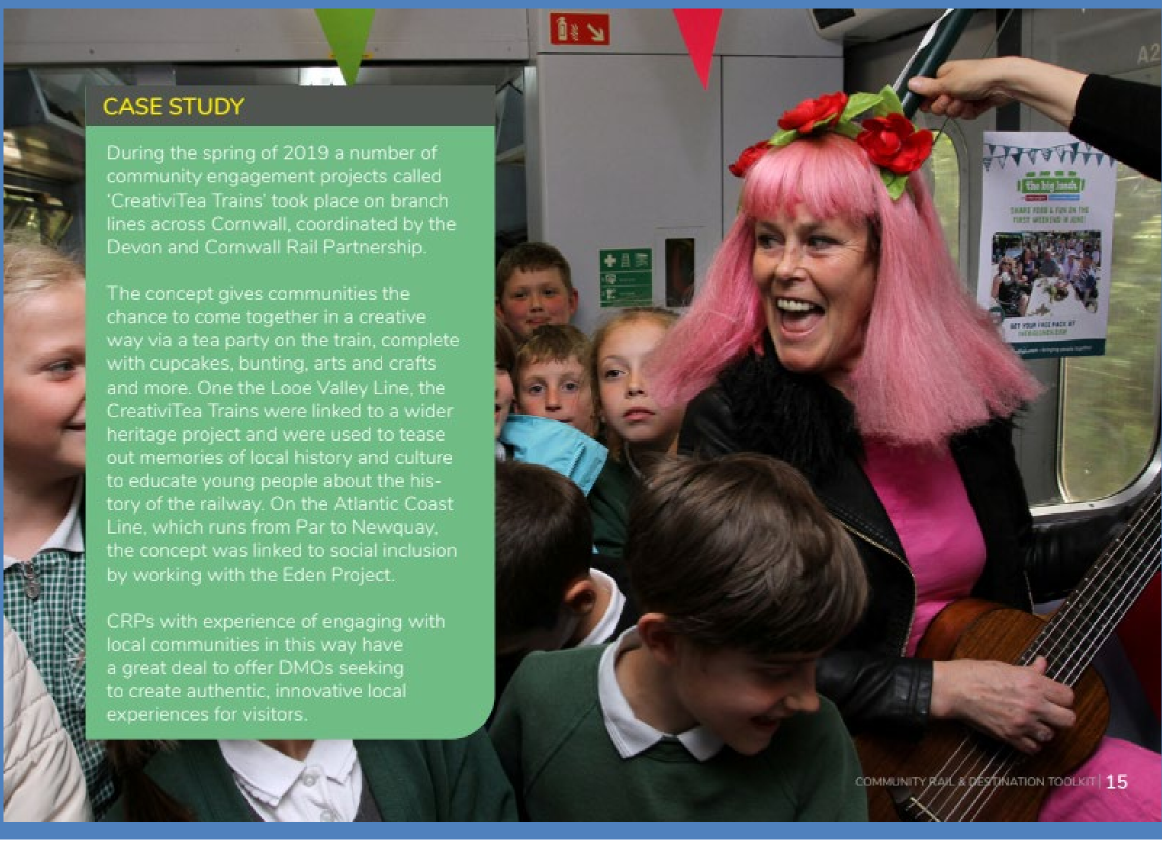
- Link to the county through transport infrastructure e.g. Stansted and other modes to attract and retain visitors in Essex as a base.
- Identify the potential to retain visitors arriving in or close to Essex via ports, air, and rail.
- Audit the current offer in themed clusters.
- Develop a Cycling and Walking First Business support programme to help the development of small businesses within a mile of the route network.
- Examine if / how visitor-centric the current plans for Coastal Paths are and advise on potential improvements, particularly on gateways, visitor facilities and infrastructure requirements.
- Identify key developments across the county (garden communities, coastal path, lower Thames crossing) and how they connect to and can support the visitor economy.
- Establish strategic partnerships with the new investors at Southend Airport, Manchester Airport Group, and the two ports to identify synergies for growth.

Opportunities for product development

- Sport and shopping tourism, as well as cultural and business events, can help to increase demand in shoulder and low seasons. The product and potential should be assessed in these areas and developed particularly where there is a positive impact on seasonality.
- Improve domestic market knowledge to be able to exploit the future staycation potential and review visitor information to identify gaps and overlaps.
- Identify honey pot sites / experiential clusters that can potentially work together with themed packages and local product.

- Identify key markets for growth and develop the products accordingly (including, but not exclusively, gateways, international, travel trade, business tourism, weddings, VFR, heritage, outdoors and culture)
- Work across sector services and businesses to develop unique packages and bookable product.
- Encourage diversification and expansion of businesses as well as attracting new operators/businesses.
- Identify and map a primary / secondary visitor route network for both walking and cycling and audit these networks, identifying key gaps.
- Develop a broader offer considering access to neighbouring regions and destination attractions from Essex.

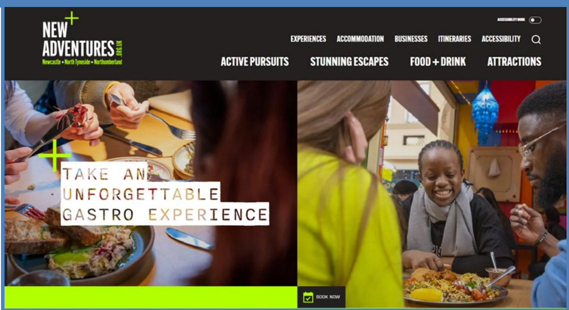
CASE STUDY CreativiTea Trains

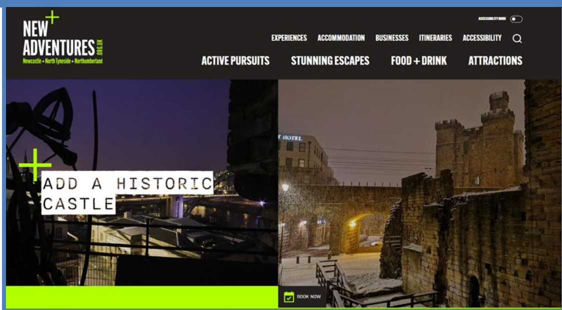


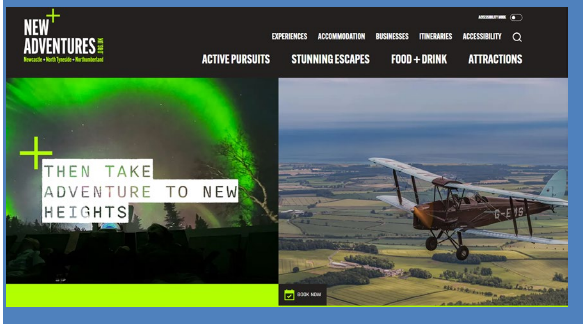
CASE STUDY Product Development (New Adventures)

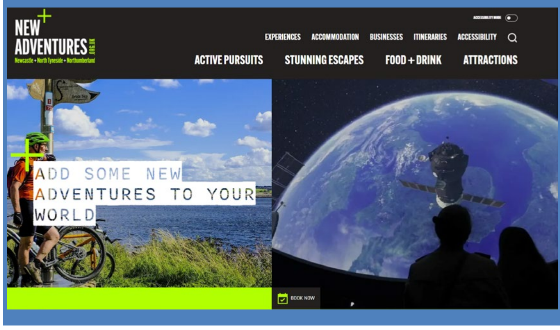
Newcastle, Northumberland, and North Tyneside have worked together to develop a new campaign called New Adventures to drive bookable product. Working with TXGB the campaign has seen 60 businesses creating new product and making it bookable online under three themes of Food and Drink, Outdoor and Active and Winter.

https://newadventures.org.uk









6.3 People Development

Tourism and hospitality is often not seen as a viable career. There are a perceived lack of attractive qualifications and training offers for those who are interested in joining the industry and employment opportunities are not always seen as valued positions. Work must be done to make the industry more attractive and to attract/retain those skills lacking, such as chefs and restaurant staff. In 2022, the visitor economy in Essex accounted for 9.3% of total employment, some 47,000 FTE jobs.

Retention and recruitment are issues to be tackled as these are affecting opening hours and productivity; this is closely linked to pay and conditions and the cost-of-living impact. Young people see transport as a barrier to employment, and also feel they need to leave Essex to progress and develop their careers; there is no clear pathway from college to industry.

Employees need to feel safe in their jobs and see a developing career. This presents challenges and opportunities for Levelling Up activities, particularly recognising the need for jobs at all levels, and in those areas where there is more reliance on tourism, opportunities for skills development should be prioritised.

This issue is not unique to Essex and provides the County with the opportunity to work in partnership with neighbouring destination and national bodies to explore opportunities. This also includes developing work experience, apprenticeships and volunteering schemes.

In addition, Essex is competing with London for talent in some areas; however, as with all priority areas, there is little data to compare salaries for leisure and hospitality businesses in Essex to other areas to highlight better opportunities.

Opportunities for People development

- Establish a youth panel and place-based ambassadors.
- Provide the opportunity for travel and tourism students to work in Essex visitor economy businesses.
- Work with Stansted Air School and the Edge Catering School, Schools, Colleges and Universities on projects and work to influence courses.
- Ensure tourism and hospitality is recognised in skills plans and encourage apprenticeships across the county.
- Connect the County's hard to reach communities to help them into the travel and tourism labour market.
- Build a regional training offer for the sector linked to hospitality, businesses, and local colleges.
- Encourage the diversification into tourism, by farmers, to help keep their businesses sustainable and protected our landscape.

CASE STUDY People – Scottish Tourism Alliance Staff Induction toolkit

This toolkit has been designed to help businesses understand the visitor economy of Scotland and to provide guidance on how to be good employers, finding the right talent, developing them, and ensuring they get the best out of the role.

https://scottishtourismalliance.co.uk/wp-content/uploads/2022/05/Tourism-Hospitality-Staff-Induction-Toolkit.pdf

6.4 PROFILE AND PERCEPTION

Essex is seen as a day visit destination, a London overspill and a route to other destinations. Currently, it does not compete well with its neighbouring destinations in Kent and Suffolk. This is often further impacted by the districts are competing within Essex rather than working together; this is exacerbated when the diverse offer and the differences between the north and the south of the county are not well connected.

The perception of the destination has been impacted by media portrayal (a one-dimensional perception) and the destination has not taken the opportunity to combat this with a different story, profile, position and pitch. The opportunity now arising from the development of the Extraordinary Essex framework is timely and an important step to countering the issues above. This DMP will develop the framework further to attract visitors. Three of the four core values in the framework, *Unrivalled Connections*, *Home to the Remarkable* and *Be Inspired Everyday* will translate very positively to visitor marketing and promotional activity. Using these themes collectively across all areas, will support the development of the visitor economy and the destinations communicating an enlarged offer, much more than a day visit destination, and one which encourages exploring and longer stays.

The time is right for a new narrative and story which positions and showcases the place and its assets, a story which is used consistently across all destinations, disciplines and departments – one which combines live, work, study, invest and visit – from marketing and communications to economic development to place making.

Opportunities for profile and perception

- Develop and lead the Essex Story, its personality and tone of voice – the brand, the guidelines, lines to take and methods of implementation.
- Place based campaigns take a bold and vibrant approach to celebrating Essex.
- Examine the potential of a marketing partnership with film studios to maximise the potential of film tourism.
- Consider the role of Essex Champions to break through perceived negative association with Essex as a place. These champions will connect closely with the new Culture Strategy Ambassadors.
- Build on the This is Essex campaign. Improve storytelling and profile the Essex USP and uniqueness.
- Visitors are encouraged to take responsibility for Essex and to be proud to look after it.

Destination comparison: Profile and perception (The Opal Coast)

The Opal Coast (from Calais to Le Touquet), is positioned, developed, and promoted by the Hauts-de-France Tourism working with the tourist boards and tourist offices in the Somme, Aisne, Oise, Pas-de-Calais, and Nord. The teams working in these destinations come together to showcase a joined-up destination and visitor experience.

Working in partnership, they present a series of tailor-made experiences that meet visitors' expectations and habits; their values are rooted in hospitality and generosity, and they prioritise visitor and resident satisfaction, meaningful tourism, and respect for the planet. This region includes coast, countryside, and city/major conurbations. Their marketing focuses on nature, the coast and walking, activities, exploring and culinary experiences, very much the essence of the place and encouraging visitors to immerse themselves in the destination. The marketing strap line 'generous by nature' chimes well with the Essex aspiration to lead on its personality as well as its assets. They also recognise their closeness to Paris and have made connections to the Olympics, but they are working hard to not rest in the shadow of the capital; underpinned by National Geographic with its lead article 'Skip Paris in favour (of Lille and) the Nord Pas-de-Calais — a region as rich in food and arts culture as it is World War history, but with a cheery spirit that puts the French capital to shame'

In addition, they have maximised the opportunities presented by business tourism, their way, showcasing team building, meetings, dinners, and events 'the French way'. There is a dedicated team with the widest product knowledge across the entire destination.

Tourism arrivals to hotels in the Opal Coast. Le Touquet alone welcomes up to 250,000 people during the summer months and almost twice as many international visitors annually as Essex. Le Touquet's main inbound markets are the UK, Belgium, Germany and the Netherlands. In terms of the accommodation offer Le Touquet has around twice the number of hotels as Essex, but a similar number if Essex' pubs/inns are included. Le Touquet has considerably more campsites, catering to the summer holiday market, which makes up almost 30% of annual arrivals.

Given the geographic proximity and similarities in terms of coastal location, it is also possible for Essex to attract these markets. Perhaps the main difference between Le Touquet and Essex is that it is known as a coastal holiday destination, whereas Essex has a more diverse offer of coast, city, town and countryside.

6.5 Sustainability and Accessibility

Sustainability and accessibility are central to national visitor economy commitments, particularly within the context of LVEP status and potential investment in the sector. Reflecting this priority, they have been integrated as cross-cutting themes within this Destination Management Plan. All opportunities and activities shall incorporate access and sustainability considerations.

The limited development of sustainable products and awareness of local accessibility assets pose challenges for Essex, potentially impeding opportunities to promote sustainable practices both to inspire businesses and visitors. Furthermore, the absence of a long-term strategy, confidence, and awareness regarding sustainability and accessibility as development opportunities within the sector further hinder progress. Refocusing on existing sustainable infrastructure and activity with associated business support packages could provide the groundwork for the development of sustainable initiatives.

Improving awareness and understanding of the opportunities related to sustainable products and accessibility provision, as well as gaining insights into business needs and requirements, will drive progress and build confidence. Communicating the business case is key and contrary to common misconception that disabled people aren't significant consumers due to limited spending power, evidence suggests otherwise. Disabled individuals, including both independent travellers and those within groups, contribute substantially to the tourism economy, with an estimated expenditure of £15.3 billion in 2019 alone (Visit England, 2019). In fact, the collective spending power of disabled individuals, known as the Purple Pound, amounts to a staggering £274 billion annually for UK businesses. Despite these contributions, adjustments and considerations for accessibility often rank low on businesses' list of priorities due to a lack of confidence in promoting existing achievements. Addressing the perception of deficient accessible accommodations and destinations and gaining insight into existing accessible assets within the destination are crucial steps to advance in this area.

Building products and opportunity around existing transport connections between London and Essex establishes viable car-free options for direct access to Essex on arrival and the potential to traveling around and from Essex, as well as travelling to and from London. Leveraging the extensive transport connections and networks already in place, we can improve awareness of the accessibility for visitors and promote sustainable tourism practices through existing assets that support sustainable and responsible tourism agendas.

Opportunities for Sustainability and accessibility

- Initial Audit of Visitor Economy
- Review of all accepted Strategic Activities against the three pillars of accessibility and prioritise.
- Accessibility Guides
- Undertake a sustainability audit of the network as regards public transport provision at key gateways
- Examine if / how visitor-centric the current plans for the Coastal Paths are and advise on potential improvements, particularly on gateways, visitor facilities and infrastructure requirements.
- Training and Business Support

CASE STUDIES – Sustainability and Accessibility

GERMAN NATIONAL TOURIST BOARD

Germany
The travel destination

TYPE OF INITIATIVE: NTO-led initiatives, working in partnership with Deutsche Bahn

ACTIVITIES: The GNTB has established a number of initiatives to promote sustainable mobility, including:

- Influencer campaigns such as #EnjoyHiddenGermany – a partnership with Deutsche Bahn. This successful macro regional influencer and social media campaign has run annually since 2018. Its aim is to promote all regions to 4 target markets: France, Italy, Spain and Switzerland. The main focus is the production and promotion of a video series, split into four seasons. The campaign worked with four travel influencers, one from each of the four different target markets. The target demographic is between 18 and 45 years old with an affinity towards travelling and an interest in nature. The four travelled in pairs along two routes and produced content along the way on a variety of topics: including rural regions, romantic Germany, wine regions, industrial culture, natural landscapes, urban lifestyle and sustainability. The journey and video production included live blogging and interactive social media activities during the trip.
- Historic Highlights of Germany: a joint campaign to promote 17 'off the beaten track' cities. Provides suggested 'heritage journeys' from Beer and Wine Heritage to Roman and Imperial. Intention is to produce 19 short videos: one covering train travel to all 17 cities; one focusing on train travel and one each for the 17 cities. The project also plans to provide information on where to get fresh food from that region (i.e. farm to fork projects with our daily farmers markets in the cities), experience local culture, and with this, elevating the regional economy and with this also the social perspective – emphasising meaningful travel.

RESULTS: Over three seasons, the social media campaign generated 27 million views on the GNTB platform. The influencers used their accounts on Instagram, Facebook and Twitter and their travel blogs to promote real travel in Germany.

KEY TAKEAWAYS: Targeted campaigns for key audiences presenting rail travel and the benefits it offers (including authentic, local experiences) in an accessible format is appealing and effective.

LINKS / SOURCES: https://www.germany.travel/en/home.html
https://historicgermany.travel/heritage-journeys/
https://historicgermany.travel

ACCESS ALL AREAS

Spotlighting Inclusivity in Gloucestershire

Improvements

Access to the Visitor Centre at Batsford has been specially designed to be inclusive, the entrance, garden, shops, Terrace Café and accessible toilets are all located on one level. The Arboretum boasts two gender-neutral, baby-changing equipped disabled toilets. Details such as picnic benches on the café balcony have been thoughtfully designed with overhangs making space for wheelchair users at the table. The Arboretum has an Access Map, available at reception or from the website which details important accessibility information such as steps and steeper gradients to reassure people when planning a visit.

Challenges

To overcome the accessibility challenges of being nestled on a hill in 2011, the Arboretum visitor centre and surrounding planting areas underwent a transformative renovation, focused on accessibility. Part of the brief for the renovation was to ensure that all paths or walkways were designed to 1:20 maximum gradient (20 units of horizontal length by 1 unit of vertical length). The Arboretum's hilltop location presented limited opportunity for parking near the entrance building so a purpose-built car park has been introduced above the buildings, with a ramp connecting the car park to the entrance. There is also a drop-off and pick-up area near the entrance.

Transport

A 5-minute Bus service brings visitors from the nearest town, Moreton, and drops passengers at the end of the Arboretum drive. But the mile-long driveway from the road to the entrance can prove a challenge. The construction of a smooth path down the long driveway is being explored.

Mobilising

To enable all visitors to access most of the Arboretum grounds, all-terrain Tramper vehicles have been introduced to help visitors with limited mobility traverse the park's various paths. These vehicles, rented from Countryside Mobility, are available, with a small fee covering insurance. This initiative has brought real joy to visitors who can now explore areas that were previously inaccessible.

In the rare event of a breakdown, users can contact staff via mobile phone, (the park has good mobile coverage) for assistance and transport back to the visitor centre.

Brilliant attraction with fabulous wheelchair access.

"Batsford Arboretum is one of the most satisfying places it is possible to visit in a wheelchair. Until recently it was satisfying but quite hard work with reasonable access limited to most of the many hard surfaced paths, but since the availability of electric 'Tramper' wheelchairs for cheap hire, was provided, practically the whole, constantly changing and spectacular, arboretum is now easily accessible, including 99% of the rough and previously inaccessible tracks which the Tramper copes with admirably. From designated disabled parking bays close to the main entrance on your arrival, right through to the fully accessible restaurant and toilets during or after your visit, the whole day is a very pleasurable and horizon expanding experience. Thoroughly recommended, and I will very soon be going back for my tenth visit."

CASE STUDY - Implementing active travel: Greater Manchester

Active Travel

Active travel refers to modes of travel that involve a level of activity. The term is often used interchangeably with walking and cycling, but active travel can also include trips made by wheelchair, mobility scooters, adapted cycles, e-cycles, scooters, as well as cycle sharing schemes. Increasing active travel will reduce road congestion, particularly at peak times, leading to increased productivity and improved movement of goods and services. Sustrans estimates that congestion costs £10 billion per year in 2009 in urban areas, and that this cost could rise to £22 billion by 2025. Living Streets' Pedestrian Pound report outlined a range of economic benefits of walking, including that well-planned walking improvements can lead to a 40% increase in shopping footfall.
Using funding from the Cycle Cities Ambition programme, Greater Manchester built 3 miles of cycle lanes along one of the city's busiest bus routes in 2017. Infrastructure installed included a mix of on-road and fully segregated cycle lanes and shared-use paths, along with 26 bus stop bypass lanes for cyclists.

The cycling measures were planned as part of a holistic design to improve the environment and maximise opportunities for cycling, walking and improved bus travel along the corridor. The overall scheme included widened footways and improved crossing facilities for pedestrians and the removal of general traffic from a section of the road at certain times of day, improving bus journey time reliability. Mitigation measures to address traffic displacement onto parallel routes were also introduced.

Surveys found that in 2018, cycling 2 miles from the city centre was up 85% against a 2015 baseline. For 2018, analysis identified more than a million journeys along one section of the route, saving an estimated 873.5 tonnes of CO_2.

Sustainable tourism considers its current and future economic, social, and environmental impacts by addressing the needs of its ecological surroundings and the local communities. This is achieved by protecting natural environments and wildlife when developing and managing tourism activities, providing only authentic experiences for tourists that don't appropriate or misrepresent local heritage and culture, or creating direct socioeconomic benefits for local communities through training and employment.

As people begin to pay more attention to sustainability and the direct and indirect effects of their actions, travel destinations and organisations are following suit. For example, the New Zealand Tourism Sustainability Commitment is aiming to see every New Zealand tourism business committed to sustainability by 2025, while the island country of Palau has required visitors to sign an eco-pledge upon entry since 2017.

TreeHugger. Sustainability for All.

CASE STUDY Sustainability (New Zealand Tourism 12 Business Commitments)

ECONOMIC	VISITOR	COMMUNITY	ENVIRONMENT
Economically sustainable, resilient and innovative businesses	World-leading experiences that exceed visitor expectations	Communities which benefit from and are supported by tourism	Protecting and enhancing our natural environment

The New Zealand Tourism Sustainability Commitment establishes 12 Business Commitments (4 themes – Economic, Visitor, Community, Environment) that individual businesses can achieve. These Commitments have been developed by industry for industry.

Economic

1. Resilience - Focus on long-term business performance and resilience.
2. Investment - Invest to create value, opportunities and to drive sustainability practices.
3. Innovation - Innovate to solve problems, create new ways to do things and increase productivity.

Visitor

4. Visitor Satisfaction - Strive to always meet or exceed visitor expectations.
5. Culture and Heritage - Embrace Aotearoa New Zealand's culture and heritage as part of delivering a unique and authentic visitor experience.
6. Visitor Engagement - Engage with visitors about how to be great travellers within Aotearoa New Zealand.

Community

7. Employer of Choice - Attract, support and develop the workforce needed to flourish and succeed.
8. Community Engagement - Actively and positively engage with the communities in which we operate, taking a leadership role to champion causes that are important to the community.
9. Sustainable Supply Chains - Have socially and environmentally sustainable supply chains.

Environment

10. Restoring Nature - Contribute to protecting and enhancing Aotearoa New Zealand's environment, including water, biodiversity, landscapes and clean air.
11. Carbon Reduction - Act urgently to contribute to Aotearoa New Zealand's transition to a net zero carbon economy.
12. Eliminating Waste - Take responsibility for the entire life cycle of products and services we use and ultimately eliminate the waste associated with these.

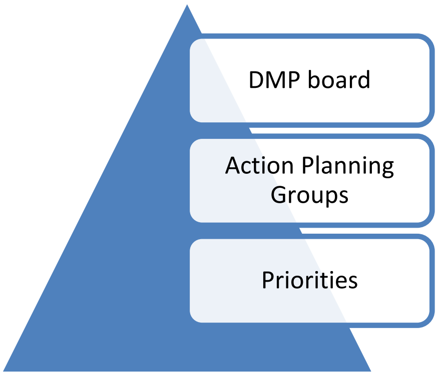
Reference: https://www.sustainabletourism.nz/about-us/about-tourism-sustainability-commitment/components/

7. ACTION PLANS

Summary Text to be added further to Action Planning session.

See attached spread sheet

8. MONITORING



The priorities of the Destination Management Plan will be the focus for action. Each priority will have an associated action planning group and group lead.

Action planning groups will be developed to map out the activities needed to implement the plan, who the key organisations are and who should take the lead role and responsibility – and ultimately who is accountable.

The group leads and nominated stakeholders will form a **Destination Management Plan steering group**. They will monitor the action plans, the progress and ensure outcomes are shared across the industry and with stakeholders. This group will identify issues and barriers and facilitate discussions across the county.

The Destination Management Plan steering group lead will ultimately report on progress to the Visit Essex Board, Essex County Council, and key strategic partners (including the district/town councils)

Destination comparison: Destination Management Plan (Visit Northumberland)

In a leadership role, Visit Northumberland acts as a catalyst for a thriving tourism sector, sustainably growing the value of the visitor economy. All activities are linked to national, regional, and local strategic economic and tourism priorities focused by data and intelligence, working to a set baseline and with clear targets for the sector. Visit Northumberland has used the Destination Management Plan (DMP) and the process of its development to build strong, meaningful and outcome driven partnerships focused on the priorities of the DMP.

The vision of the DMP is to create an environment in Northumberland for tourism and the visitor economy to develop and flourish sustainably, maximising benefits and combating negative impacts, for the benefit of local communities, businesses, visitors, and the natural environment. The underpinning sustainable development principles focus on activities taken by visitors, businesses, and all those active in the visitor economy to minimise the negative environmental and social impacts of tourism, and to enhance the economic and cultural benefits for visitors, businesses, and host communities.

The DMP particularly identifies both supply-side and demand-side factors that contribute tangibly towards the sustainability/regeneration of the places and communities in which it operates; with actions and activities working towards lessening the impact of tourism on the environment and local culture.

Visit Northumberland recognises the importance of responsible tourism development, and actively works to develop compelling, accessible, and inclusive visitor experiences and developments that contribute positively towards the sustainability and regeneration of places, provide benefit, and reduce the impact on local communities.

The development of the DMP brought partners, stakeholders, and the wider industry together to create a roadmap for destination development. This included five industry-led sector forums (Accommodation; Attractions; Outdoor, Recreation and Environment; Hospitality; People and Place) to ensure a coherent approach to the DMP. In addition, Visit Northumberland engaged with other stakeholders via themed summits, questionnaires and one to one debates.

By adopting an industry-led approach, the sector groups became an integral part of the destination management planning process, with members representing the geography and diversity of the respective sector, reflecting the range of quantity and quality of product and appeal to the destination's core visitor segments. The chairs of the sector groups and key stakeholders form an overarching DMP Board, with a remit to work through the priorities, actions, and implementation of the plan; and to ensure a consistent approach to development and monitoring as the DMP moves forward.

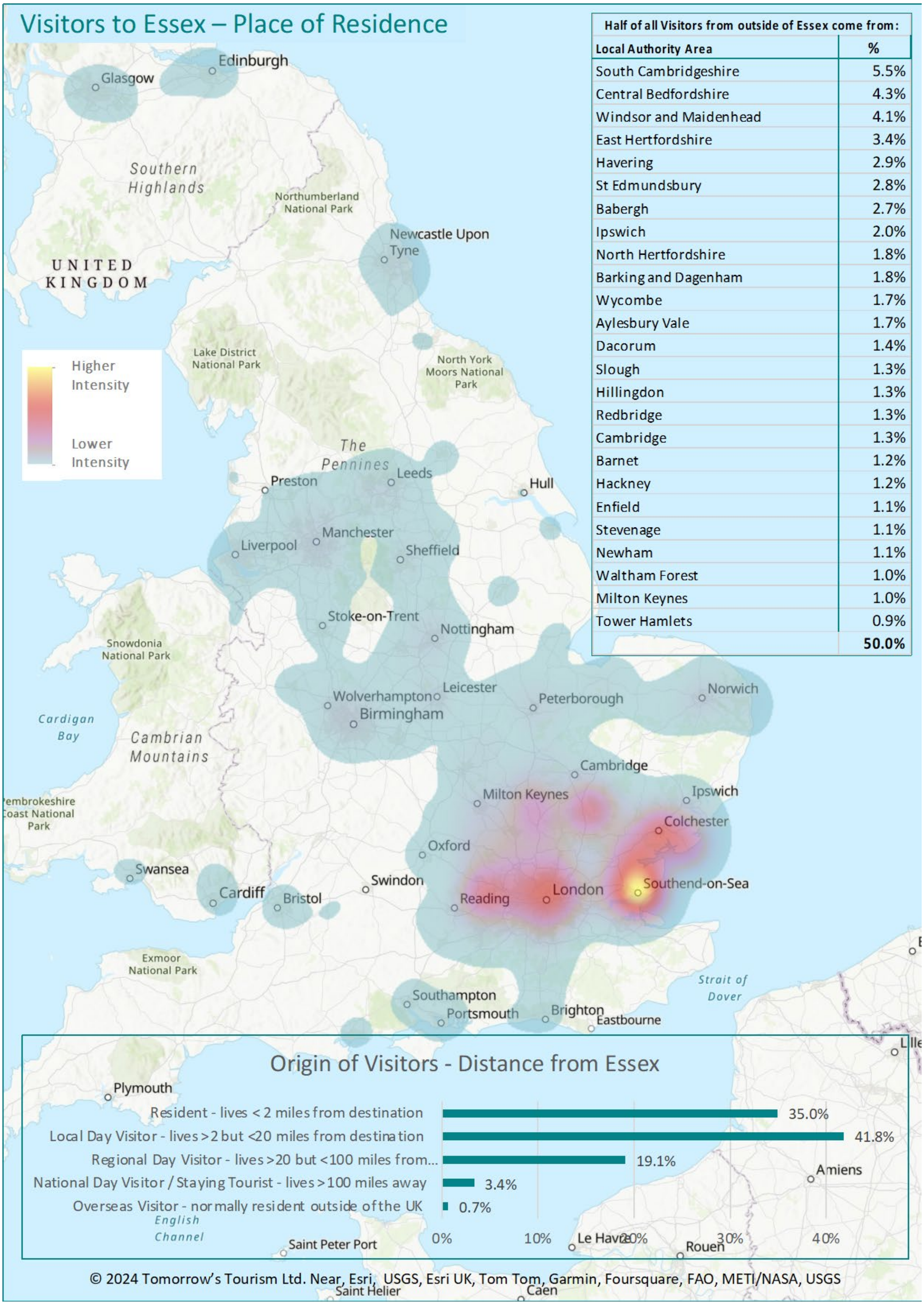
ANNEX I STRATEGIC ALIGNMENT

Essex County - Strategy or Plan		
Date	**Title**	**Alignment / Shared Priorities**
2024	Delivering for North Essex *	Innovative businesses, skilled residents, green growth, visitor economy promotion
2023	Cultural Strategy	Amplify, (profile), grow (product -film location/museums etc) collaboration
2023	Sustainable Growth Delivery Plan	Jobs, Growth & Investment strands includes Essex profile activity and business growth
2023	National Landscape Management Plan	Sustainable tourism, management, place and collaboration in Suffolk / Essex NL
2020	Green Infrastructure Strategy	Coast & countryside (place), PROW, (product), marketing, branding, promotion (profile)
2021	Walking Strategy	Coastal Path (Product), Ob.6 Walking for leisure, Ob.7 supporting economic developme
2016	Rural Strategy	Rural economy, skills, attracting visitors, culture, heritage, environment
2010	Integrated County Strategy	Low carbon, support to key sectors incl. tourism (GE3) improve connectivity
2023	Extraordinary Essex	Profile, promotion of visitor economy, inward investment, study, work
2011	Transport Plan (LTP$_3$)	Walking PROW, Cycling, Access to travel, information for visitors, coast
2023	Climate Action Plan v2	Local nature partnership, transport, waste, green skills
2023	A Wilder Essex - Essex Wildlife Trust	Sustainable tourism, nature recovery, visitor attractions and experiences
2022	Skills Plan	Increase apprenticeships, simplify landscape, raise awareness
2021	Everyone's Essex	Jobs, green growth, transport
2023	Local Skills & Improvement Plan	Does not reflect the needs of hospitality / tourism businesses or sector
	* Similar plan in progress for South Essex	

Essex County - Strategy or Plan	Destination Management Plan Priorities								
Title	**Collaboration**	**Place**	**Business**	**Product**	**People**	**Profile**	**Sustainability**	**Accessibility**	**Total**
Delivering for North Essex *	2	2		1		2	1		8
Cultural Strategy	2	1		2		3			8
Sustainable Growth Delivery Plan		2	2		1	3			8
National Landscape Management Plan		2		1		1	3	1	8
Green Infrastructure Strategy		3		2		3			8
Walking Strategy	1	1	1	2			1	1	7
Rural Strategy	2			1	1	2	1		7
Integrated County Strategy			3		1	1	2		7
Extraordinary Essex	3					3			6
Transport Plan (LTP$_3$)		2		2			1	1	6
Climate Action Plan v2		1			2		2		5
A Wilder Essex - Essex Wildlife Trust		1		2		1	1		5
Skills Plan	2				3				5
Everyone's Essex					2		2	1	5
Local Skills & Improvement Plan			1		1				2
* Similar plan in progress for South Essex									

1	Some alignment - connection beneficial in strategic terms
2	Plans Aligned - connection important in strategic terms
3	Full Alignment - demands close connection in strategic and delivery terms

ANNEX II – ORIGIN OF VISITORS TO ESSEX



Half of all Visitors from outside of Essex come from:	
Local Authority Area	**%**
South Cambridgeshire	5.5%
Central Bedfordshire	4.3%
Windsor and Maidenhead	4.1%
East Hertfordshire	3.4%
Havering	2.9%
St Edmundsbury	2.8%
Babergh	2.7%
Ipswich	2.0%
North Hertfordshire	1.8%
Barking and Dagenham	1.8%
Wycombe	1.7%
Aylesbury Vale	1.7%
Dacorum	1.4%
Slough	1.3%
Hillingdon	1.3%
Redbridge	1.3%
Cambridge	1.3%
Barnet	1.2%
Hackney	1.2%
Enfield	1.1%
Stevenage	1.1%
Newham	1.1%
Waltham Forest	1.0%
Milton Keynes	1.0%
Tower Hamlets	0.9%
	50.0%

ANNEX III – WHO DOES WHAT?