

TEES VALLEY DESTINATION MANAGEMENT PLAN

BASELINE EXECUTIVE SUMMARY

In preparing the Destination Management Plan, destination specialist Blue Sail was engaged to undertake extensive analysis and research. A full detailed baseline report was produced, and this executive summary captures the main findings.

STRATEGY & POLICY ENVIRONMENT

- ▶ The importance of the visitor economy to regional regeneration and prosperity is evident in strategies, policies and plans throughout the Tees Valley. Prominent themes include the need for collaboration across the sector; development of 'Place' for the benefit of both visitors and residents; raising profile and improving perceptions; increasing overnight stays.
- ▶ Darlington, Redcar & Cleveland and Stockton-on-Tees each have Visitor Economy Strategies/Destination Management Plans. Hartlepool and Middlesbrough's tourism policies are currently contained within their wider local/strategic plans.
- ▶ Tourism has been one of the hardest hit sectors of the UK economy by COVID-19 and recovery is at the forefront of strategic planning, nationally and regionally.

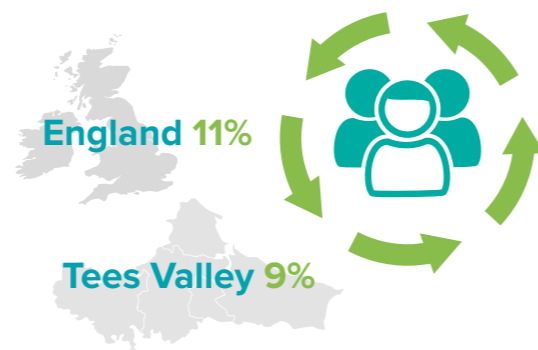
VISITOR & ACCOMMODATION DATA

In 2019, just over 20 million tourism visits were made to the Tees Valley, generating more than £1billion for the local economy. The number of tourism visits to the Tees Valley equates to 30 times the size of the resident population.



The COVID-19 pandemic is estimated to have resulted in visitor numbers and tourism economic impact being down by approximately 60% in 2020 compared to 2019.

Visitor expenditure supports an estimated 12,391 full time equivalent jobs in the local economy. Data from ONS's Business Register and Employment Survey shows that tourism industry employment accounts for 9% of all industry employment in the Tees Valley, compared to the England average of 11%.



Day visitors to the Tees Valley are dominant. The day visitor market accounts for 89% of all trips and 66% of tourism economic impact.

The staying visitor market in the Tees Valley follows a similar seasonal pattern to England as a whole, with 57% of trips taking place between April and September. The day visitor market has a pronounced peak in the month of July – 14% of day visits compared to 9% in England.

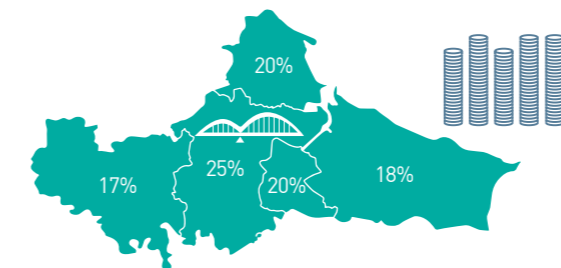
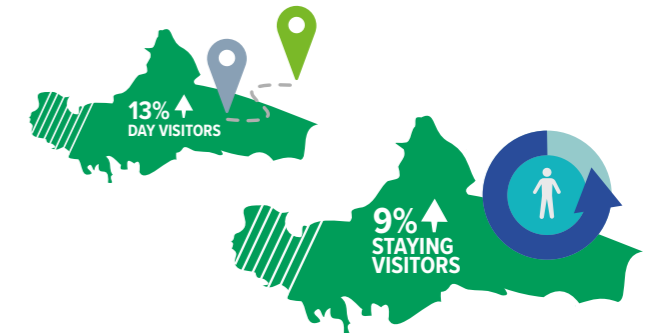


VISITOR & ACCOMMODATION DATA



The average length of stay by domestic overnight visitors is slightly shorter in the Tees Valley compared to the England average. Average spend per night is reasonably similar, whereas average spend by day visitors is considerably lower than the national average.

Pre-pandemic, tourism had been growing steadily. Between 2014 and 2019, visitor numbers to the Tees Valley increased by 13% – day visitors and staying visitors by 9%.



Stockton-on-Tees accounts for 25% of Tees Valley's tourism economic impact, Hartlepool 20%, Middlesbrough 20%, Redcar & Cleveland 18% and Darlington 17%.

MARKET ANALYSIS

- ▶ The current visitor market is primarily local, regular visitors on a day out.
- ▶ 'The Tees Valley' as a destination is largely invisible in online searches. Some persistence is required to find it (beyond the Enjoy Tees Valley site) and there appears to be a lot of confusion over where it is, as it is variously merged into Durham or North Yorkshire itineraries.
- ▶ Tees Valley businesses follow this pattern too, associating themselves with Co. Durham countryside, North Yorkshire Moors and coast, Durham City and York.
- ▶ Post-pandemic and global trends provide opportunities for the Tees Valley – particularly around outdoor activities, authenticity, health and wellbeing and multi-generational travel.
- ▶ The market opportunity is for staying visitors from a two-hour drive time, and one-hour travel time for day visitors (from home or on holiday elsewhere). Two of VisitEngland's segments show most potential – Fun in the Sun Families and Adventure Seekers. The Free & Easy Mini-Break segment could be appropriate for specific events and reflects the region's ambition to appeal to and retain younger demographics in the resident population.

PRODUCT AUDIT

- ▶ A product audit identified seven 'signature experiences' and associated 'hero' products – themed or geographic clusters that present distinctive features of the Tees Valley as a visitor destination. These are:

- Maritime & Industrial Heritage – National Museum of the Royal Navy, Transporter Bridge, Captain Cook Birthplace Museum
- Railway Heritage – Head of Steam Darlington Railway Museum and ongoing work to strengthen the Stockton & Darlington 26-mile route
- Saltburn – Saltburn Cliff Tramway, Saltburn Pier, Saltburn Beach, Saltburn Miniature Railway
- Watersports and Adventure – Tees Barrage International White Water Centre, Hartlepool Marina, Flow Surf School, Saltburn Surf School, Redcar Beach, FlowRider, Air Trail
- Walking & Cycling – Cleveland Way National Trail, Teesdale Way, English Coast Path, Guisborough Forest & Walkway, national cycle routes and Roseberry Topping
- Nature & Wildlife – Teesmouth National Nature Reserve, RSPB Saltholme, Kirkleatham Owl Centre
- Heritage Attractions – Ormesby Hall, Raby Castle, The Gardens at Wynyard Hall, Kirkleatham Museum, Preston Park Museum, Gisborough Priory

- ▶ In addition, there is a wide range of cultural festivals and events, with several attracting visitors from outside the Tees Valley, including Stockton International Riverside Festival, Middlesbrough Art Weekender and the Festival of Thrift.

- ▶ Across the region there is a strengthening food and drink offer which extends from the social enterprise Big River Bakery through to the 4AA Rosette Orangery at Rockliffe and the Plot to Plate offer at Wynyard. Regular food markets bring variety and local flavours to the fore including at the Orange Pip Market and Saltburn Food Festival.

- ▶ Visitor accommodation is made up as follows:

- A small number of 5 and 4-star destination/country house hotels, including Rockliffe Hall, Wynyard Hall and Gisborough Hall
- Self-catering properties, mostly in seaside/rural areas, account for just 10% of the Tees Valley bedspace supply
- 17 caravan/lodge/camping sites account for 8% of all accommodation establishments. Many are small sites with a small number of touring pitches but there are distinctive glamping sites such as Baby Moon near Guisborough and North Shire near Saltburn
- Each of the five districts has a number of self-catering establishments listed on AirBnb – 537 'entire home' properties in total across Tees Valley. A third of these are available full time

- ▶ Conference and meeting space in the Tees Valley is available predominantly through hotel facilities. There is no dedicated large-scale conference centre. Wynyard Hall, Gisborough Hall, Jury's Inn Middlesbrough and the ARC Stockton Arts Centre can accommodate up to 400 delegates. Other facilities include Kirkleatham Walled Garden, Teesside University Campus, Riverside Stadium and Darlington Mowden Park.

BENCHMARKING

- ▶ A number of relevant destinations were reviewed as part of the baseline to identify lessons and good practice for the Tees Valley. This included the South Wales Valleys, Ireland's Hidden Heartlands, The National Forest, Glasgow, Belfast and Bordeaux. The main findings and lessons are:

- Local authority and administrative boundaries are meaningless to visitors. Working across them and with neighbours can strengthen the offer and make a visit more compelling. It also enables different places to work on similar issues or challenges without diluting their own identity
- Destinations which are not as well established should lead with experiences rather than geography or landscape, creating the inspiring reasons to visit. Investment in experience development must support growth
- With positioning and branding it is important to develop a clear and easy-to-articulate brand and equally important to ensure it is applied consistently and as widely as possible
- A market focus is common to all successful destinations – 'something for everyone' doesn't work
- There is a virtue in a post-industrial landscape and a number of markets find it appealing and edgy. Using water and developing blueways and greenways can unite different areas and create a visitor experience. Culture is a significant catalyst for regeneration
- The warmth and welcome of people is a strong asset and should not be overlooked.
- Sustainable and environmental credentials need to be more than lip-service and require commitment across the public, private and third sector
- Strong leadership can make a huge difference in the speed of change and progress. While that leadership often comes from within the public sector, delivery requires a partnership approach among public, private, third sectors as well as local communities

VISITOR/NON-VISITOR/RESIDENT SURVEY (QUALITATIVE AND QUANTITATIVE)

- ▶ 466 visitor/non-visitors and 166 residents were surveyed in August 2021. 30 follow up qualitative interviews were also conducted spanning visitors, non-visitors and residents.
- ▶ The research suggests that the Tees Valley offer aligns well with what people want from a day trip or staycation. Coastal and rural experiences, along with towns and villages, are in high demand. There is a desire to experience new things, underpinned by wanting space to explore.
- ▶ Industrial perceptions prevail and cloud opinion of what a trip to the area would be like.
- ▶ People may be familiar with pockets of the region – a specific town or local authority – but few appreciate the breadth of what the Tees Valley has to offer.
- ▶ There is a willingness to visit, based on the promised offer of dramatic landscapes; adventure, culture and heritage; and independent food and drink. Offering 'value' is important, particularly around accommodation, and is likely required to entice people away from better known destinations.
- ▶ In contrast, residents know and appreciate what's on their doorstep. They recognise that it's not widely known and take satisfaction from its unspoiled, uncommercial nature. But they also feel that, as a local economy, it's not delivering its full potential – due to a low profile and dated perceptions.
- ▶ Residents' feedback highlights gaps in the quality of the offer. The town centres stand out, along with public transport provision. Addressing these will be important to boost leisure trips amongst local audiences, but also to ensure that the expectations of those visiting from further afield are met.
- ▶ Keeping things fresh for residents is important too. Events and festivals provide scope to encourage visits to overlooked – or overdone – attractions.
- ▶ Getting people to think about the Tees Valley, and to think differently about it, is the communications challenge. There is a need to define the area for potential visitors and so show them how it works together as a destination.
- ▶ As acknowledged by respondents, the Tees Valley offer has similarities to other, more established destinations. Whilst hugely appealing, they want to be told about a point of difference. The space that comes with the undiscovered and unspoiled nature of the Tees Valley has potential to engage, so long as this is supported by infrastructure and facilities in line with expectations.
- ▶ Communication is also important for the residential market – to keep the local offer front of mind, and also to re-align negative perceptions, particularly around town centres.

BUSINESS SURVEY

- ▶ 39 businesses responded to a tourism business survey undertaken in September 2021.
- ▶ Strengths of the Tees Valley offer were proximity to coast and countryside, the range of the offer ('something for everyone'), arts and culture, and the people and businesses.
- ▶ Weaknesses were the low levels of awareness of the Tees Valley among visitor markets, poor perceptions of the area and a lack of coverage, infrastructure and poor place maintenance, and a lack of flagship visitor attractions.
- ▶ 'Friendly', 'undiscovered', 'welcoming' and 'industrial' were the top four words used to describe the Tees Valley.
- ▶ The coastal scenery and beaches were the strongest associations with the Tees Valley among business.
- ▶ Business perception was that the Tees Valley caters better for older/retired visitors.

