

ECONOMIC DEVELOPMENT COMMITTEE

8 SEPTEMBER 2021

VISITOR ECONOMY RECOVERY PLANS FOR 2021-22

1.0 Purpose of Report

- 1.1 To provide the Economic Development Committee with an update on activity to support the recovery of the district's visitor economy in 2021-22.

2.0 Background Information

- 2.1 Members approved a refresh of the Visitor Economy Strategy 2020-23 and noted plans to support the recovery of the district's visitor economy, presented to the Economic Development Committee in November 2020 and March 2021 respectively.
- 2.2 After sustained annual growth in the value of the economic impact of the district's visitor economy, including +3.7% in 2018 and +6% in 2019, the COVID-19 pandemic made 2020 the most challenging year on record for the UK's tourism and hospitality sectors. This was felt across the district with a significant fall of **-56.3%** on the value of the economic impact of the district's visitor economy and of **-54.4%** on that of Newark, with visitor numbers declining by **-64.7%** and **-55%** respectively.

Scarborough Tourism Economic Activity Monitor (STEAM) Data for 2020*:

	2017	% Change	2018	% Change	2019	% Change	2020
1. Value of economic impact of visitor economy – Newark & Sherwood District	£271.46m	+3.7%	£281.56m	+6.0%	£298.32m	-56.3%	£130.23m
2. Value of economic impact of visitor economy – Newark	£25.80m	+5.6%	£27.25m	+3.9%	£28.32m	-54.4%	£12.92m
3. Total annual visitor numbers to Newark & Sherwood District	4,414,000	-1.1%	4,366,000	+2.2%	4,461,000	-64.7%	1,575,000
4. Total annual visitor numbers to Newark	455,060	+0.3%	456,480	+1.9%	465,040	-55%	209,290

5. Total annual visitor days to Newark & Sherwood District	5,762,000	-0.4%	5,740,000	+3.4%	5,934,000	-59.5%	2,405,000
6. Total annual visitor days to Newark	549,610	+0.7%	553,260	+1.7%	562,730	-55.1%	252,410
7. Direct Employment in Newark & Sherwood District	2,537 FTEs	+2.5%	2,599 FTEs	+2.9%	2,675 FTEs	-51.3%	1,303 FTEs
8. Direct Employment in Newark	289 FTEs	+4.5%	302 FTEs	+0.4%	304 FTEs	-47.7%	159 FTEs
9. Total Employment in Newark & Sherwood District	3,294 FTEs	+2.1%	3,363 FTEs	+2.8%	3,458 FTEs	-52.3%	1,649 FTEs
10. Total Employment in Newark	356 FTEs	+4.2%	371 FTEs	+0.5%	372 FTEs	-49%	190 FTEs

2.3 In the face of this disruption and the ongoing uncertainty associated with COVID-19 that continues to challenge the tourism and hospitality sectors, we need to be proactive and competitive in our plans to support the district's visitor economy in its recovery to increase its economic impact, achieve the vision in our [Community Plan](#) ("...encouraging more visitors to enjoy all that Newark & Sherwood has to offer"), and the objective to "Deliver inclusive and sustainable economic growth".

2.4 In doing so, we can maximise emerging opportunities for recovery. A recent consumer poll by Visit England indicated that 62% of UK adults planned to take an overnight UK trip by the end of 2021 (compared to 23% planning to take an overnight trip overseas). The UK 'staycation' has been enjoying a welcome resurgence. Furthermore, less crowded UK destinations that are away from the traditional 'hot spots' and are considered 'rural', 'seaside' or 'small town', are perceived as 'safer' and therefore at a competitive advantage. Visitors within our main age category (56+ years) may be more wary of travelling and exposing themselves to increased risks of COVID-19. However, they are also significantly more likely to have been double vaccinated and to seek 'safer' destinations such as ours. Finally, this demographic segment is also likely to include 'empty nesters' with more potential spending power than younger segments during economic recovery from the pandemic.

3.0 Proposals

3.1 Our plans to support the tourism and hospitality sector in recovery are focussed on four main pillars of operation:

- Relationship building with sector partners/stakeholders
- Destination development

- Destination marketing
- Visitor insight, knowledge and research

3.2 Relationship building with sector partners/stakeholders

- 3.2.1 We have continued to build multiple external relationships and develop our reputation as recognised and trusted place ambassadors at different levels. We recommenced the leading and facilitating of district-wide Tourism Action Group (TAG) meetings in March. Although the meetings have been held online so far, they have been well received by attractions and businesses across the district's tourism and hospitality sector and have proven useful for sharing news, insight, ideas, good practice, campaigns and offers. Currently, we plan to recommence in person TAG meetings from September at different locations around the district (starting with NTU Brackenhurst Campus in Southwell) in order to provide familiarisation and networking opportunities again. We have continued to facilitate and develop the TAG Facebook group, enabling members of the group to engage with each other outside of the schedule of meetings. We have also linked in with a number of other groups that are contributing to developing and promoting the visitor offer such as Newark Heritage Forum, Newark Business Club and Southwell Tourism Partnership.
- 3.2.2 The district's Tourism database of attractions and businesses has been reviewed and updated to enable us to continue to engage effectively with the wider sector beyond those who are represented in the above groups. It now includes up to date contact details for 240 attractions and businesses across the district. Throughout the COVID-19 pandemic, we have provided timely information, updates and advice to businesses across the tourism and hospitality sector, including signposting to important financial support packages and trusted sources of further information and guidance. The feedback we have received indicates that this service has been greatly valued and importantly helped to strengthen our relations with the sector. Drawing on a range of recognised sources, we will continue to provide such timely and accurate information and advice throughout the forthcoming period of recovery and beyond.
- 3.2.3 We are also working with colleagues to deliver resilience support from our £300,000 Business Resilience and Growth Programme to the district's visitor accommodation providers – a sector that has been particularly impacted by the past 18 months. Through our appointed consultants, accommodation businesses can apply for places on a 12-week programme of specialist business advice and support from industry experts in the sector and, upon completion, a potential business development grant of up to £2,000 each. This advice and guidance will support them in adapting and developing new business plans to strengthen their business resilience. The review and update of the Tourism database has enabled us to promote this opportunity directly to the district's visitor accommodation providers alongside our appointed consultants' engagement with the sector.
- 3.2.4 We are also continuing to develop our external relationships at regional and national level. Through regular contact with organisations such as Visit England, Visit Notts, Nottinghamshire County Council, LNER and East Midlands Railway, we are well-placed to align our activities with strategic initiatives and to raise our destinations' profiles as part of wider visitor campaigns and opportunities. For example, our attractions and businesses are being promoted at national and international level through our proactive participation in [The Explorer's Road](#) project, a 300-mile, self-guided touring route of the East of England, which was relaunched by Visit England at the end of July 2021. Due to our participation,

campaign partners LNER featured Newark and Sherwood in all of their Explorer's Road advertisements promoting travel south to London and north to Edinburgh. We are also participating in this year's national Heritage Open Days programme with more than a dozen events taking place across the district, most of them in person again this year.

- 3.2.5 One area of the tourism sector that has been impacted negatively even more than most by COVID-19 is group travel. Most tour operators have recently restarted limited services to test customer confidence and demand. Through our membership of the Association of Group Travel Organisers (AGTO) and relationships with the sector's specialist media, we are remaining closely informed of developments and, in turn, liaising with our attractions and businesses about the development and promotion of their group offers to the trade. For example, we are currently working with our partners at Southwell Minster to promote the restored Chapter House to group travel operators. Group Leisure & Travel magazine recently worked with us on a very positive [three-page feature on our destinations](#).

3.3 Destination Development

- 3.3.1 On account of the strengthened relationships summarised at para 3.2 above, we are using our influence to help progress initiatives to develop our destinations. NSDC is in the rare and privileged position of having a number of different, coexisting place-shaping roles including as leader, facilitator/coordinate, partner/stakeholder, commissioner, investor, asset owner/manager and informed expert. This year, for example, we are using our role as leader to shape and commission one of the priority Towns Fund projects – 'The Cultural Heart of Newark'. This new programme of events and experiences will enhance the vibrancy of Newark town centre and drive increased footfall, dwell time and spend to it. We have continued to lead the Forest Corner masterplanning project, working closely with multiple partners and stakeholders to develop a deliverable new vision for this unique and popular area. As the accountable body, we have secured Places To Ride grant funding from Sport England / British Cycling for a new community cycling hub at Thoresby Vale which aligns perfectly with our brand proposition for Sherwood Forest as a 'green and active family experience' (outdoor activities, connect with the natural environment) and the 'Aspirational Family Fun' audience described as 'regularly take breaks where they can indulge in active, family-friendly pursuits, sporting events and festivals.' We have also been working with our delivery partner, Harworth Estates, to identify a suitable external operator for the new cycling facilities.
- 3.3.2 Much of our influencing role draws on our ability as 'informed expert' to provide insight, knowledge and research that is relevant to the visitor experience. This will continue to help colleagues, partners and stakeholders to shape their proposals and develop effective business cases. An update on this area of operation is provided below at para 3.5.

3.4 Destination Marketing

- 3.4.1 With the exception of a relatively short period in late summer/early autumn, the pandemic prevented us from delivering a plan of destination marketing activity in 2020. The circumstances this year however have allowed us to relaunch brand awareness-raising and response-driving promotional plans to support the district's visitor economy in its recovery.
- 3.4.2 In the spring, we aligned with the Council's 'Lifting Lockdown' programme by running a 'Doorstep Days Out' social media and pay-per-click campaign. The activity was targeted at a mainly local audience, encouraging residents to enjoy great days out while staying local by

visiting the district's attractions. With an emphasis on the outdoors and wellbeing, the activity struck the right balance with changing COVID-19 measures and people's need for a change of scenery. Consequently, the campaign was successful with a total reach of 1,939,395 and 2,460 engagements. The most popular posts were those for 'Palace at the Castle', 'Tours, trails and activities at Sherwood Forest' and 'Rufford Abbey Country Park'.

- 3.4.3 Following the 'Doorstep Days Out' campaign, we launched our 'Staycation' campaign in late July after the remaining COVID-19 restrictions ended. It will run until the end of October. With a wider domestic audience, the campaign is primarily targeting families with children throughout the school summer holidays and then focussing on the 56+ years segment in September and October. The campaign comprises a bespoke '[Staycation' microsite](#)', a competition to win a short break, online advertising, a podcast and a 30-second TV advert for broadcast on ITV Anglia West – this area offers the best value in terms of reach with coverage down the A1 to places like Bedford and Hitchin. Some (low-resolution) examples of the new 'Staycation' campaign advertising can be viewed at:

<https://tpc.googlesyndication.com/simgad/8358932616207481578>

<https://tpc.googlesyndication.com/simgad/13396839149578937128>

<https://tpc.googlesyndication.com/simgad/18288734858747161438>

- 3.4.4 In addition to the targeted campaigns, we are also providing visitors and potential visitors with a more engaging and user-friendly web and social media presence to influence their online choice of destination. Stronger digital marketing across search engine optimisation (SEO) and pay-per-click (PPC) is helping to improve our websites' rankings in search engine results. We are monitoring and reporting performance quarterly through the following measures:

- Unique visits to the three tourism websites
- Social media impressions
- Social media engagements
- Video views
- Social media followers

- 3.4.5 There is still an important role for printed materials, albeit largely for when people are already visiting a destination and considering what to do, having done the majority of their destination research and decision-making online beforehand. This year we have amended and reprinted our visitor 'maps' leaflet that highlights the main visitor attractions across the district and illustrates their proximity to each other. 65,000 copies were distributed in June to visitor accommodation providers and tourist information centres across Nottinghamshire, Lincolnshire, Derbyshire, Leicestershire, Yorkshire, Norfolk, Cambridgeshire, Bedfordshire, Essex, Northamptonshire, Staffordshire, Warwickshire, Worcestershire, Gloucestershire, Lancashire and Cheshire. A further 2,000 copies are being distributed locally through TAG members. As part of our participation in this year's national Heritage Open Days programme, we have also produced a printed leaflet providing details of the HODs events taking place across the district, which is being distributed by our heritage partners.

3.5 Visitor Insight, Knowledge and Research

- 3.5.1 The data quoted above at para 2.2* is taken from the annual Scarborough Tourism Economic Activity Monitor (STEAM) that we subscribe to. It is widely acknowledged as the industry standard with high levels of accuracy down to district level. Whilst the negative impact figures for 2020 are exceptional due to the COVID-19 pandemic, the annual data will enable us to measure the extent of recovery this year and in subsequent years. As well as being the source used for the value of our economic impact of the visitor economy figures, it also provides us with a wide range of other data sets including visitor numbers, visitor days, visitor types, employment and sectoral distribution of economic impact at district and also town (Newark only) level.
- 3.5.2 In order to gain and share an understanding of the tourism and hospitality sector's post-COVID recovery and confidence, we undertook stakeholder research across the district in June (ahead of COVID-19 restrictions ending). The results of the survey are at **Appendix A**. Some key points to note are:
- 78% had received business support measures since the start of the pandemic
 - For those that had reopened, the majority reported their visitor numbers as 'similar levels to normal'
 - Although the majority thought their attraction or business will not do as well in the next 6 months (from June) as it would have done, the majority thought it will do the same in the next 12-18 months (from June) as it would have done, with 13.5% thinking it will do better in the next 12-18 months (from June)
 - The majority thought it 'very likely' that they will recruit new staff in the next 6 months (from June)
 - The majority were 'somewhat optimistic' about their post-COVID prospects
- 3.5.3 With COVID-19 restrictions ending, we also commissioned our biennial qualitative visitor market research after we were unable to do so in 2020 due to the pandemic. We are undertaking face-to-face interviews with visitors at events, attractions, public spaces and travel hubs throughout the district between August and October. This will ensure that we continue to improve our knowledge of the visitor experience, develop an understanding of who our visitors are and what they feel about their experiences in order to inform strategic decisions around destination development and destination marketing by ourselves and our partners/stakeholders.

3.6 How Will We Know If We Are Successful?

- 3.6.1 We are monitoring 16 performance indicators. 11 of these relate to the quantitative and qualitative data that we commission from independent, external organisations annually (one is actually biennial but will apply to 2021). The remaining five performance indicators relate to statistics drawn from our own analytics data that are compiled and reported on corporately each quarter.
- 3.6.2 Although more subjective and less tangible, we are also measuring progress in light of feedback received from our wide range of partners and stakeholders including attractions and businesses from the district's tourism and hospitality sector. This is helping us to gauge initial reaction to our activities and to develop or adjust our plans accordingly.

4.0 Equalities Implications

- 4.1 Delivery of our visitor economy recovery plans will always consider equalities to ensure that visitors and potential visitors with protected characteristics are not disadvantaged in their experiences. For example, our visitor websites have been developed to make them more accessible and compliant with new public sector website accessibility regulations.

5.0 Digital Implications

- 5.1 None.

6.0 Financial Implications – (FIN21-22/3622)

- 6.1 None. The costs of delivering our visitor economy recovery plans are being met via the annual allocated Promotion of Tourism budget.

7.0 Community Plan – Alignment to Objectives

- 7.1 The aims of our visitor economy recovery plans align clearly with the vision in our Community Plan (“...encouraging more visitors to enjoy all that Newark & Sherwood has to offer”) and the objective to “Deliver inclusive and sustainable economic growth”.

8.0 RECOMMENDATION

That Members note our activity to date in supporting the recovery of the district’s visitor economy in 2021 and beyond.

Reason for Recommendation

To enable Officers to continue to deliver strategic and operational support to the district’s visitor economy as an important asset for economic recovery.

Background Papers

NSDC Visitor Economy Strategy 2020-23

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