

Developing Derby as a Visitor Destination

Destination Management Plan 2020 – 2025

"Towns and cities...need to find their own distinctive solutions, should be bold in doing so and should always keep their distinctive culture at the forefront". *Place Shaping in Towns and Cities*, Locum Consulting.

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1. FOREWORD

Developing Derby as a Visitor Destination 2020/2025

A Destination Management Plan (DMP) is a strategic tool for developing and managing a destination. The purpose of this DMP is to help Derby to develop as a visitor destination in order to increase and broaden the benefits of the visitor economy.

Derby attracts more than 8 million visitors annually (The tourism definition of a visitor is a traveler taking a trip outside his/her usual environment, for less than a year, for any main purpose). Visitors to Derby contribute £426 million in economic impact and support over 5000 jobs in the sector. (Global Tourism Solutions Ltd, Scarborough Tourism Economic Activity Monitor 2017.)

In a challenging economy it is more important than ever that people see Derby as a great place to live, work, visit, study and invest.

Destination Management is about making sure the visitor offer is attractive, appealing and good value for money so that it can be sustainable in a very competitive market. Derby has not yet reached its potential in developing as a visitor destination and the sector is capable of delivering significant growth for the city.

Hotels, venues, restaurants, cafes and pubs, attractions, events and retail outlets are all part of the visitor experience and must contribute effectively to the overall offer together with infrastructure including parking and public realm. All visitor facing businesses require a mix of audiences to be sustainable. At any one time, a proportion of each businesses customers will be 'visitors'.

By definition a visitor is anyone who has made a choice to come to a destination. Visitors make their choices based on the reputation that a destination has built and their perception of the experience it will offer. Derby must project a clear and distinctive identity to be competitive as a destination of choice for visitors whatever their purpose or length of stay.

"Cities in Britain are not about size, they're all about character. All of our cities offer not only their own history but also, most importantly, their own personality." Weightman, I.(2018). 'Visit Britain ViBE report', Weightman PR Newsletter.

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The term visitor is applied despite a wide range of actual purposes for the said visit, from business and leisure, to domestic and international, day trippers and overnight stays. It is widely recognised that activity aimed at attracting visitors whatever their original purpose or length of stay, will also build pride and a sense of ownership and responsibility amongst residents.

If we effectively develop, manage and promote Derby as a destination the benefits are highly tangible for everyone.

- An improved reputation.
- A thriving Visitor Economy providing sustainable employment.
- Increasingly competitive when bidding for events, conferences, exhibitions etc.
- Successful in retaining businesses and attracting inward investment.

Vision: The City of Derby continues to develop and improve as a sustainable, competitive visitor destination based on a growing reputation for providing a quality experience across all aspects of the visitor journey.

Objectives:

Objective One: Support new product development that will increase visitor numbers, reach new audiences, enhance the visitor experience and/ or improve Derby's reputation.

Objective Two: Advocate for the visitor economy to inform and influence policies, planning and development of the city.

Objective Three: Communicate a clear identity for the City of Derby that accurately expresses the unique and authentic visitor experience.

These objectives will be achieved through partnership working with stakeholders from across the industry.

2. INTRODUCTION

This Destination Management Plan (DMP) replaces the Visitor Economy Strategy (VES) 2011-2016, updating the objectives to reflect changes in the environment and acknowledging the current strategic context.

Creation of the DMP.

Creation and review of the DMP is the responsibility of the local Destination Management Organisation (DMO). In Derby, the organisation that leads on the coordination of destination management locally is VisitDerby (the Derby City Council Tourism Team). VisitDerby therefore, acts as the lead organisation responsible for the development and delivery of the DMP in partnership with appropriate businesses from across the industry through the DMP Steering Group. The DMP should provide a roadmap providing a context for the work of the DMO and other stakeholders.

By working in partnership we not only avoid fragmentation and dilution but work towards a combined view and vision for the city which will lead to a stronger message and a better managed destination.

"Well-managed destinations are more likely to sustain investment, business growth and employment ... The best-managed destinations are also likely to attract inward investment across a broader range of sectors, as well as value-added jobs and new talent. Making them great places to live and work as well as visit".

VisitBritain (2018) Structure of Tourism in England. <https://www.visitbritain.org/structure-tourism-england>

The first step to achieving a well-managed destination is to understand the current situation and context.

With that in mind this DMP sets out to:

- **Benchmark the quality and quantity of the current Visitor Experience based on available evidence**
- **Analyse the findings**
- **Define the vision and set objectives**
- **Create an action plan to deliver objectives**
- **Define effective measurement tools**

3. EVIDENCE BASE

The Visitor Economy is a core contributor to the economic profile of the city, impacting on or being impacted by a variety of business sectors and industries. The information that informs this strategy has been gathered from other strategies, reports, stakeholder interviews and visitor surveys. (See Appendix 2 for a list of consultees). Consequently, objectives arising from the creation of the DMP are advised by current performance, local issues and external trends.

Product Audit

If we are to maximise the value of the Visitor Economy to Derby, we need to understand the quality and quantity of the current product offer across all aspects of the industry including any new developments in the pipeline. This will show us what is working well and should be promoted, where the issues or gaps in the offer are, together with the opportunities for growing our share of the visitor economy.

People visit a destination for many reasons and purposes from business meetings to attending a sporting or cultural event or just to try somewhere new. Whatever its original purpose, each visit is typically made up of a variety of elements that contribute to the complete experience. From the value of the accommodation offer, variety of events, accessibility of attractions to the quality of the built environment; the success of each element is interdependent on others to create the overall appeal of a destination and deliver visitor satisfaction.

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A list of businesses that contribute to the visitor experience in Derby can be found at www.visitderby.co.uk - the official destination website for the city, managed by VisitDerby, the Derby City Council Tourism Team. Each landing page reflects the different sectors or tourism facilities that make up the industry to create a seamless experience for visitors as they plan their trip. Each page cross references others in order to encourage visitors to add more elements to their itinerary and broaden the value of visitor spend to more businesses over a longer period.

To get an overall picture of the visitor experience it is also necessary to consider the city infrastructure as it affects visitors, plus the way that it is presented to potential audiences.

Each aspect of the visitor experience should be considered in terms of quantity and quality to give us a baseline. The VisitDerby website content has been used to provide quantitative data. Qualitative evidence is based on visitor surveys, (as collated in previous reports, completed questionnaires from the Visitor Guide and Sales and Information Centre and online surveys) strategies and reports plus stakeholder consultation (captured through interviews and meetings with key stakeholder/ groups). The statements listed are aggregated from a variety of similarly expressed experiences and views rather than isolated individual comments. (Please see Appendix 3: Detailed report from research and consultation.)

It is important to note that using data from different sources may result in some contradiction of results. However, for the purpose of benchmarking we are looking to measure the trend rather than specific numbers.

Tourism Facilities

Accommodation (plus meeting and conference facilities)

A product audit on the accommodation sector in Derby can be found at Appendix 3.

Derby's accommodation stock is largely made up of branded hotel chains. In some instances this makes engagement difficult with contribution to destination objectives superseded by loyalty to brand. Most product is within the budget brand segment to 3* with a lack of 4-5*

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accommodation. This leads to competition within the segment and suppresses the revenue per available room. (revPAR)

The national trend for growth in this sector is within the unique, independent, boutique segment and Derby (along with Nottingham) has a lack of product, making this an opportunity for investment.

"Compared to other parts of England, Derbyshire and Nottinghamshire are lagging behind other destinations in terms of the development of branded boutique, budget boutique and lifestyle hotels in Nottingham and Derby; luxury and boutique country house hotels; market town boutique hotels; boutique inns". Hotel Solutions, (2017) D2N2 Visitor Accommodation Strategy –Executive Summary.

Whilst there is a very small amount of boutique, independent accommodation within the city, there are a few, high quality examples that have attracted significant national media interest.

Planning policy should be strategic and take into account gaps in the sector whilst avoiding increasing the pressures created by over-supply.

Action: Engage with stakeholders including DCC planning plus potential investors and developers to ensure understanding of accommodation sector supply and demand in Derby. Understand obstacles and issues being reported by developers.

Capacity mid-week is mainly taken up through business tourism created by corporate multi-national businesses with local offices, most notably Rolls Royce and Toyota Motor Manufacturing. Restrictions placed on travel and meetings by these companies have made the business unstable in recent years, whilst the revPAR is driven down through competition to contract with appointed agencies. There is currently an over reliance on a small number of companies.

"Midweek demand is strong, particularly on Tuesday and Wednesday nights, when city centre hotels frequently fill and turn business away. Corporate rates are low in the city however, due to

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stiff price competition between hotels and the dominance of a few very large companies that command low room rates from the city's hotels. The weekend market is much more challenging and low-rated. Hotel Solutions, (2017) 'D2N2 Visitor Accommodation Strategy – Report of Key Findings'.

Reduced demand at weekends is reported by most accommodation providers. Much of the available business is based upon Derby being a central location accessed by a good road and rail network, for a low-cost city break for family/ friend occasions. The low value of this business does not encourage ongoing investment by the hotel chain. A more sustainable proposition needs to be built upon proximity of nationally/ internationally significant attractions such as Chatsworth, together with awareness of the destination created by a regular calendar of quality events, plus the appeal of Derby attractions.

The majority of accommodation providers report the need for more weekend activities, events and attractions in the city in order to increase demand. At present only one event (Download Festival) can be relied upon to fill the city hotels at weekends. Some providers reported notable demand during Feste, Format and The Derby Folk Festival based on room bookings for artists etc.

Some providers are programming their own events in order to increase weekend bed bookings. These appear to have met with mixed success.

The sector is looking towards the opening of the Museum of Making to create a step change in weekend demand. Recent experience of large scale cultural events including the Weeping Window at The Silk Mill, The Knife Angel and Museum of the Moon at Derby Cathedral plus Leonardo Da Vinci: A Life in Drawing exhibition at Derby Museum, has demonstrated the impact that quality cultural events can have on the economy. Building on these successes, the industry would benefit from an increase in quality events which have the potential to attract overnight/ day visitors. The events would ideally be spread throughout the year particularly at weekends when accommodation demand from the business sector is low.

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OTA (Online Travel Agents) commission is a major issue for the sector, which is shared nationally.

Action: Explore and develop plans for attracting new cultural/ leisure events to Derby, particularly at weekends.

The lack of a dedicated conference venue in Derby or Nottingham was noted as a gap in the Visitor Economy Review and Investment Study produced for D2N2.

"... As a result, the area is almost certainly losing out to some extent when compared to other destinations which can offer purpose-built facilities. The economics of dedicated conference centres are not easy. In the right locations they invariably bring wider economic benefits, but they also require careful consideration and realistic business plans." Colliers Int. (2014) 'D2N2 Visitor Economy Review and Investment Study'.

The report goes on to note the likely displacement in the event that a dedicated conference facility was to open in Nottingham.

Despite the lack of a dedicated venue, there are however, a number of developments that will increase the opportunity to attract business visits and events (BV&E) to the city. It is recommended that the relevant organisations work in partnership to attract new business, maintain contact with event organisers, actively develop joint sales activity and work together to keep enquiries in the city.

Action: Explore and develop opportunities to attract more BV&E to Derby venues.

Attractions and Events

"Any progressive city or town should be constantly thinking about how it can add to the quality and range of its attractions". Locum Consulting, 'Place Shaping in Towns and Cities'.

A product audit on the attractions and events sector in Derby can be found at Appendix 3.

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An analysis of visitor research showed that most visitors were motivated to visit Derby for 'culture'. Whilst the term is subjective, the results suggest that Derby has a reputation as a destination with a significant cultural offer.

"Derby is currently home to eight Arts Council National Portfolio organisations and a wide range of independent theatre companies, games and software designers, artists and galleries, musicians, promoters and studios, museums and built heritage, and a year-round programme of festivals and outdoor arts." Derby Culture Strategy.

Many of the key events which may be contributing to a growing awareness of Derby as a cultural hub are produced in partnership with cultural organisations and attractions across the city. This collaborative approach is a significant asset which has led to the creation of events such as Feste, Format, Hannells Darley Park Concert, the Book Festival, the Folk Festival and more, all of which have had a significant positive impact on Derby's reputation.

Concern was expressed relating to funding issues which could affect the future of these events and the venues that come together with resources to deliver them. Financial resources for marketing the events are very limited and prohibitive to reaching larger audiences. Whilst the quality of these events is seen as being high, the frequency of the quality events leaves significant gaps which the industry would like to see being addressed.

It was felt that this emerging reputation as a cultural destination is an asset to development and should be protected and enhanced as part of Derby's identity.

The attractions in Derby are seen as being of good quality but relatively small with primarily local or regional interest. This limits the potential to attract overnight visitors unless attractions are hosting an event with a more national perspective or where Derby is the closest venue for regional audiences.

Action: Ensure that representatives from amongst the portfolio organisations are on the DMP Steering Group to share issues and opportunities.

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Most stakeholders interviewed, reported feeling that the Market Place is underutilised as a venue for events. They would like to see it fulfil its potential to be a vibrant place to congregate for visitors and residents alike. At present the process for delivery of events on the Market Place and other public spaces is largely reactive. The opportunity exists to develop an increased focus on attracting and programming of appropriate events for the more prominent public spaces.

Action: Engage with relevant colleagues and stakeholders to explore a vision for the Market Place which will improve the environment and open the opportunity for a programme of quality events.

Derby is reported to have better than average access for wheelchairs users. Improving access should be considered during any development but especially for planning future use of the Market Place. In addition the opportunity to improve advice relating to accessibility is available through the Nimbus Access Card, Accessible Derbyshire and a recent user audit with much greater detail than the current practice of adding or omitting the wheel chair symbol. Working in a collaborative way with these organisations, could increase audiences through improved information and promote best practice whilst also identifying areas for improvement.

Action: Include accessibility in future plans for the Market Place plus other developments and events. Improve accessibility information on VisitDerby by providing accurate and detailed listings.

The Museum of Making due to open at Derby Silk Mill in 2020 is highly anticipated particularly in its ability to attract nationally significant exhibitions. The attraction bridges the gap with the wider DWMWHS via the River Derwent. Being the Southern Gateway to a World Heritage Site is a significant opportunity but the quality of the visitor experience along the valley is varied and the product does not yet hold together as a cohesive experience. Nevertheless, the new attraction is a major investment with a tangible interpretation of Derby's unique identity. The opening of the attraction creates the opportunity to tell the Derby Story and use such to create a sense of place which informs future development.

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Action: Explore how the Museum of Making at Derby Silk Mill can benefit the wider city and be a catalyst for identifying and promoting Derby's unique identity.

The Visitor Economy Review and Investment Study produced in May 2014 by Colliers Int. for D2N2, mentions the Derby Market Hall as another opportunity for investment. Essential maintenance is currently underway in both the Guildhall Theatre and the adjoining market. Once completed there are plans for refurbishment in order to deliver a more attractive market model.

Action: Increase engagement of the DMP Steering Group with the Market Hall/Guildhall Theatre projects.

Derby is proud to have been successful in achieving and maintaining Purple Flag status since 2013. Purple Flag is an accreditation scheme that recognises excellent management of city centres at night. The early evening economy however, continues to be an issue for Derby.

Action: The DMP Steering Group to increase understanding of Purple Flag and how the visitor economy can support a better early evening economy.

Dine (the food and beverage sector)

A product audit on the dining sector in Derby can be found at Appendix 3.

Recent years have seen an increase in the number of quality independent cafes and restaurants opening in Derby, supporting already established credentials as a city with a strong Real Ale/Craft Beer industry. However, many such businesses have gone on to close within a short period of time, giving rise to concerns about the sustainability of such businesses without a corresponding increase in footfall.

Part of the solution is seen to be an increase in city living and student accommodation. A number of projects in the pipeline should deliver new apartments for city living and hence footfall/ custom.

Action: Ensure that independent F&B businesses have a chance to be represented within the DMP Steering Group and increase engagement between the DMP Steering Group and public/ private sector development of city living. Maintain contact through Vibrant City Partnership.

Tourism Infrastructure

Transport

Impact on and from The Visitor Economy should be considered within Local Transport Plans.

Visitor research showed that payment by card for parking has become an expectation. This is now in place at most local authority operated car parks.

Coach parking is currently provided courtesy of a private landowner who secured temporary planning permission on land which will ultimately be built upon. This will leave a gap which would ideally be filled with a more permanent solution in order to provide enhanced facilities for drivers and consistency to enable tour operators and group organisers to plan ahead.

VisitDerby is working with East Midlands Railway to promote travel to Derby events and attractions. It is noted however, that there are significant obstacles in travelling to attractions and events beyond Derby using public transport.

Action: The DMP Steering Group to engage with the development of Local Transport Plans to explore potential solutions to travel to, around and out of Derby.

Signage

There is currently a lack of gateway signage on the main arterial routes into and out of Derby. Commercial activity on the available outdoor advertising assets replaces strategic place-making with third party sales messages which could potentially conflict with a vision and identity for the city.

Action: The DMP Steering Group to engage with City Wide vision/ place-making discussions.

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A number of stakeholders reported a need for more and affordable signage opportunities, particularly in the city centre. This is limiting potential audience growth for events, which in turn affects the sustainability of attractions and inhibits the reputational opportunity provided by the hosting of quality events. Creative event promotion through signage would help to improve the vibrancy, aesthetic and atmosphere in the city, particularly in the Market Place, making it a more pleasant place to spend time and creating a sense of inclusivity and community. Event signage around the city and gateway signage promoting events and culture in general would help to improve reputation and mitigate the impact of commercial use of signage.

Action: Increase the opportunity for event promotions to include signage/ lamp post banners in the Market Place, other high footfall areas throughout the city and gateways.

Visitor Services and Marketing

Derby City Council continues to fund the Derby City Council Tourism Team (2.8 FTE posts) as the Destination Management Organisation known to the public and industry as VisitDerby. Since 2015 VisitDerby has been a membership organisation with listing/ membership fees supporting marketing activity.

Resources are limited which is affecting the amount of activity that can be undertaken but the investment continues to fund the Destination Management Website, www.visitderby.co.uk plus Social Media and digital marketing which are growing in visitors and followers.

During the consultation for the DMP, views have been expressed by some stakeholders that VisitDerby should develop a conference bureau aspect and explore potential funding models that would enable income generation for other areas of work.

Action: Increase awareness of Derby as a conference and event destination with a variety of existing and new BV&E venues.

Existing twinning relationships and/ or memorandum of understanding activity, is being developed to attract numbers of visitors as well as exploring trade opportunities. This is delivering results, particularly within the Chinese group market and should be further developed.

Action: Develop product for Chinese and other International markets.

4. STRUCTURE AND GOVERNANCE

The DMP will be delivered in partnership through the DMP Steering Group with a membership made up from the various sectors making up the visitor economy plus Derby City Council.

The Derby Culture, Leisure and Tourism Board has adopted the DMP and will provide the governance/ reporting structure to ensure effective delivery of the action plan. A representative from the DMP Steering Group will also sit on the Vibrant City Board in recognition of the many cross-cutting themes and actions.

5. STRATEGIC CONTEXT

Trends in UK tourism

In 2017 the UK welcomed a record 39.2 million inbound visits, 4% more than in 2016. There was also a record £24.5 billion spent in the UK – up 9% on 2016. 2018 saw a decline of 3% in visitor numbers which still leaves 2018 as the second highest in terms of numbers and spend, ever recorded. Statistics available for 2019 show a slight increase on 2018 and VisitBritain forecasts an overall increase on 2018.

VisitBritain (2019) To be found at: www.visitbritain.org/2019-inbound-tourism-forecast.

People come from all over the world to visit Derby for a variety of purposes. Data from the ONS-IPS (face-to-face interviews with a sample of passengers travelling via principal airports, sea routes and the Channel Tunnel) shows that visits to Derby in 2017 increased by 12% over the previous year. The increase from 2010 to 2017 was 19%

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Source: International Passenger Survey, Office for National Statistics								
	2010	2011	2012	2013	2014	2015	2016	2017
Derby	97*	103*	75*	96*	97*	105*	102*	115*
* 000								

The Great British Tourism Survey measures Domestic Overnight Tourism Performance. In 2017, British residents took 100.6 million overnight trips in England -1% higher than in 2016. Visits to the East Midlands accounted for 7% of the overall trips taken.

The trend clearly shows that there is an opportunity for economic growth through development of the Visitor Economy in Derby, providing that the issues and opportunities are addressed through city-wide strategy and policy.

Derby Masterplan

The City Centre Masterplan sets out a strategic context for investment opportunities in the city over a period of 15 years (2015-2030), demonstrating the Council's commitment to the regeneration of the city centre.

The masterplan has been conceptualised by the business community in partnership with Derby City Council. The Vibrant City Partnership, a sub-group of Derby Renaissance Board, has a wide-ranging membership including key organisations and businesses in the city centre. The Board includes the Visitor Services and Development Manager in order to reflect the issues and opportunities presented by the Visitor Economy via the DMP.

Action: A proposed review to the City-centre masterplan will offer an opportunity to more closely engage with the DMP action plan. To be discussed at DMP Steering Group.

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Partnerships

The DCC Tourism Team works with a variety of partners in many different ways to achieve shared or complementary objectives.

VisitBritain is the name used by The British Tourist Authority. This is the national tourist agency responsible for marketing Britain worldwide and developing Britain's Visitor Economy.

One of four key objectives listed in the Strategic Framework for Tourism published in 2010 is to 'increase England's share of global visitor markets', with an ambition to increase the value of tourism by 5% annually over ten years.

The Derby City Council Tourism Team -VisitDerby is recognised as the DMO for the city of Derby. The Team responds directly to requests for information to fit with their campaigns including PR initiatives.

Funding managed by VisitBritain has been delivered through the Discover England Fund for projects based on developing UK wide themes and products aimed at changing domestic and International behaviour. Derby's ability to engage with larger projects and to bid for external funding is inhibited by lack of available match funding. There are currently no open calls for projects.

Marketing Peak District and Derbyshire (MPD&D) is the regional DMO. It is a membership organisation that receives core funding from Derbyshire County Council to deliver tourism for Derbyshire. MPD&D is responsible for delivering the Peak District and Derbyshire Growth Strategy for the Visitor Economy 2014-2020.

Derby's location and proximity to the countryside and attractions of Derbyshire and The Peak District, remains an important factor in attracting visitors. Whilst it is important to maintain a connection for relevant projects and activities, some businesses in Derby report feeling a lack of connection and relevance towards MPD&D based on their mainly rural branding.

The Derwent Valley Mills World Heritage Site (DVMWHS) encompasses visitor experiences from Derby and out along the WHS corridor, into the county and vice versa. Derby's relationship with DVMWHS will become more significant with the impending opening of the Museum of Making at

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Derby Silk Mill. Derby City Council is represented on a number of WHS strategic and delivery groups.

Metro Strategy is a project to create closer links with the neighbouring city of Nottingham. One of the potential areas for joint development is the business visits and events market.

D2N2 is the Local Economic Partnership for the region. The Visitor Economy is one of six priority sectors targeted for delivering growth.

A Visitor Economy Advisory Group to D2N2 has delivered some worthwhile activity but currently meets infrequently.

Marketing Derby is responsible for attracting inward investment. The city must be perceived as vibrant to maximise quality of life for prospective employees. Hence, Marketing Derby and the Derby City Council Tourism Team share some objectives and messages which they communicate to their respective audiences.

Business Improvement Districts (BIDs) There are currently two BIDs in Derby although both have very different and relevant priorities. Most BIDs around the UK tend to be single destination.

Focus for marketing promotions is primarily aimed at residents and workers in the BID districts. The funding (which comes from a levy paid by local businesses) provides some sponsorship for events with a requirement that the events carry BID district branding. There is currently a lack of resource to promote Derby as a destination to wider audiences with a potentially higher spend. Consequently, more money and resources are being spent on promotion within the destination, than in attracting visitors to Derby which could benefit the whole city.

6. VISION, OBJECTIVES AND ACTION PLAN.

To be effective in helping Derby to develop as a destination, the DMO needs to have a clear vision that can be supported by all partners. The following vision is based upon the various forms of research noted above.

Vision: The City of Derby continues to develop and improve as a sustainable, competitive visitor destination based on a growing reputation for providing a quality experience across all aspects of the visitor journey.

Objectives and Action Plan

OBJECTIVE One:
Support new product development that will increase visitor numbers, reach new audiences, enhance the visitor experience and/ or improve Derby's reputation.
ACTIONS
<p>Increase awareness of Derby as a conference destination with a variety of existing and new BV&E venues.</p> <p>Increase engagement between the DMP Steering Group and public/ private sector development of city living.</p> <p>Maintain contact through Vibrant City Partnership.</p> <p>DMP Steering Group to increase understanding of Purple Flag and how the visitor economy can support a better early evening economy.</p> <p>Increase engagement of the DMP Steering Group with the Market Hall/ Guildhall project.</p> <p>Explore how the MoM can benefit the wider city and be a catalyst for identifying and promoting Derby's unique identity.</p> <p>Include accessibility in future plans for the Market Place plus other developments and events.</p> <p>Improve accessibility information on VisitDerby by providing accurate and detailed listings.</p> <p>Engage with relevant colleagues and stakeholders to explore a vision for the Market Place which will improve the environment and open the opportunity for a programme of quality events.</p> <p>Ensure that representatives from amongst the portfolio organisations are on the DMP Steering Group to share issues and opportunities.</p> <p>Explore and develop opportunities to attract more BV&E to Derby venues.</p> <p>Develop product for Chinese and other International markets.</p> <p>Explore and develop plans for attracting new cultural/ leisure events to Derby, particularly at weekends</p>

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Objective Two:
Advocate for the visitor economy to inform and influence policies, planning and development of the city.
ACTIONS
<p>A proposed review to the City-centre masterplan will offer an opportunity to more closely engage with the DMP action plan. To be discussed at DMP Steering Group.</p> <p>DMP Steering Group to engage with vision/ place-making discussions .</p> <p>DMP Steering Group to engage with the development of Local Transport Plans to explore potential solutions to travel to, around and out of Derby.</p> <p>Engage with stakeholders including DCC planning plus potential investors and developers to ensure understanding of accommodation sector supply and demand in Derby. Understand obstacles and issues being reported by developers.</p>
Objective Three:
Communicate a clear identity for the City of Derby that accurately expresses the unique and authentic visitor experience
ACTIONS
<p>Increase the opportunity for event promotions to inc signage/ lamp post banners in the Market Place, other high footfall areas throughout the city and gateways.</p>

APPENDIX 1: SWOT Analysis

STRENGTHS	WEAKNESSES
<p>Growing recognition for culture based on events and festivals.</p> <p>Location - 90 mins from London. Good road and rail access.</p> <p>Southern gateway to the DVMWHS, Peak District and Derbyshire and national attractions.</p> <p>New attractions and developments: Museum of Making, River bus, Swimming Pool.</p> <p>Reputation for Real Ale/ Craft Beer.</p> <p>Association with International brands inc. Rolls Royce, Toyota, Bombardier, Royal Crown Derby.</p> <p>Award winning green spaces and Purple Flag for evening economy.</p> <p>Established DMO – VisitDerby with experienced team.</p>	<p>Insufficient funding to be competitive with other destinations.</p> <p>Lack of awareness as a leisure tourism destination.</p> <p>No clear place making/ branding strategy.</p> <p>Various organisations competing for sponsorship, membership, advertising support from a small customer base - competing branding.</p> <p>No permanent Coach Park.</p> <p>No purpose built conference venue. Lack of awareness as a conference/ meeting destination.</p> <p>No nationally recognised branded visitor attraction</p> <p>Gaps in accommodation stock and capacity.</p> <p>Lack of funding for VisitDery. Limited opportunity to attract external funding due to lack of match</p>
OPPORTUNITIES	THREATS
<p>Product is better than reputation.</p> <p>Undeveloped as a leisure tourism destination which offers a significant opportunity for growth.</p> <p>The rest of the City could benefit from footfall and reputational value created by new attractions.</p> <p>An engaging historical story with a strong legacy relating to creativity and engineering.</p> <p>Elevate awareness of Joseph Wright.</p> <p>Proactive partnerships</p> <p>Potential to host conferences and events</p> <p>Growing relationship with China (and Japan) leading to increased numbers of visitors.</p> <p>New Swimming Pool Complex.</p>	<p>Declining relevance due to lack of funding/ ability to participate in some projects/ invest in new technology etc.</p> <p>Weakening of existing marketing tools through lack of resource for development and maintenance.</p> <p>Lack of awareness of the potential of the Visitor Economy amongst some stakeholders.</p> <p>Competitor destinations spending much more on marketing.</p> <p>Competing priorities in Derby City Council.</p>

APPENDIX 2: Consultees

In preparation for creating the DMP, feedback was sought from stakeholders through presentations at established groups and meetings together with face to face interviews and email consultation with business owners/ operators. These were selected with a view to balance across the various sectors affecting and influencing the Visitor Economy.

Each consultee was asked to comment on each sector in turn, with consideration to what we have that works well, what could be better and what issues within this sector affect their business. Similar comments have been aggregated.

Cultural Partners Group

Vibrant City Partnership

Derby City Council Scrutiny Board

Leisure and Culture Board

University of Derby External Partner Group

Derbyshire Hoteliers Association

Members of Derby Destination Management Plan Steering Group:

Carol Thomas - Derby Cathedral

Mohammed Suleman - Derby Museums

Adam Buss - Quad

Stephen Munn - Deda

Peter Helps - Sinfonia Viva

Adam Tamsett – Intu

Matt Hutchings – Derby Conference Centre

Public consultation via questionnaires completed in the Sales and Information Centre and online (using Hotjar) 2017 – 2019

APPENDIX 3: Detailed report from research and consultation

Visitor research results

The Visitor survey data used for the analysis in this DMP was a sample size of 471 which was gathered via questionnaires within the Derby Visitor Guide distributed around Derbyshire, questionnaires completed in the Derby Sales and Information centre and responses to pop up questions on visitderby.co.uk using 'Hotjar'.

Accommodation

Baseline

The Stay landing page on the visitderby website lists the various types of accommodation available. At the time of analysis (Winter 2018) there were a total of 2100 rooms represented by the website listings. The type of accommodation can be broken down as follows:

Hotels = 24 Boutique = 3 Self-catering = 5 Serviced apartments = 4 B&Bs/Guesthouses = 8

Visitor Research

Analysis of the data shows an average length of stay of 2.5 nights in Derby. (Respondents to the visitor surveys analysed are likely to be leisure visitors). Average spend from overnight visitors is £165 pp per night compared to a day visitor spending £54 pp.

No issues regarding the quality of the accommodation were reported in visitor surveys, although the question is not asked specifically at this time. It should also be noted that there is no way to measure the impact created by gaps in the market particularly where these are in the accommodation type where there is most growth potential. The gap in Derby is identified in the consultant reports.

Stakeholder Consultation

A summary of the views expressed by stakeholders is included in the main body of the report

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Consultant reports, reviews and available data

The Visitor Economy Advisory Group (VEAG) to the D2N2 LEP commissioned Colliers Int. to produce an accommodation investment study for the region. The review identified issues and opportunities in the sector.

The Visitor Economy Review and Investment Study 2013/14 (also commissioned by the VEAG and completed by Colliers Int.), made the following observations concerning the accommodation sector in the city

- Availability at weekends creates an opportunity for good value leisure breaks
- Good range of branded hotels in the gateway cities of Derby, Sheffield and Manchester
- Occupancy rates and achieved room rates in Derby and Sheffield are below the UK regional average which will limit further new investment. RevPAR however, is the main issue.

Figure 4: Core Cities Hotel Statistics

2013	Derby	Nottingham	Leicester	Sheffield	Birmingham	Liverpool
Occupancy	68%	67%	67%	72%	68%	70%
Average Room Rate	£49	£53	£54	£54	£63	£62
RevPar	£34	£35	£36	£38	£43	£43

Source: STR Global

- Derby has a number of factors which suggest that there might be demand for conferencing facilities. ... Negatively however, a number of neighboring cities such as Nottingham and Leicester already offer good facilities. A feasibility study would be required to determine real demand

Attractions and Events

Baseline

Attractions and events make up the content of the Things to Do and What's On landing pages respectively on visitderby.co.uk

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It is difficult to accurately define attractions as they come in various guises from unique heritage assets to national family attractions, from museums to parks. For the purpose of creating a measureable baseline we will refer to the 35 venues currently listed as attractions on VisitDerby.

Visitor research

Analysis of the visitor surveys did not suggest quality issues with the attractions. Comments made do suggest that there is a perception of not a lot happening in Derby. Although these weren't significant in number they are backed up by statements made by the businesses interviewed.

Visitor survey results show that culture is the Visitor Economy sector that has the most influence in motivating people to visit Derby. Of the data sampled 26% of respondents quoted culture as an activity that had been or was planned to be, a part of their visit. The cultural experience is made up of attractions and events. Attractions referred to included Derby Cathedral, Quad, Derby Museums, Deda and Royal Crown Derby. Events are listed separately in the questionnaires and account for 6% of the visitor sample. Many of the events are organised jointly by various cultural partnerships in the city. Visiting the wider area accounted for 10% of the results.

Other attractions mentioned in previous survey results include Derby Roundhouse, Markeaton Park and some of the major sporting and cultural events. "Respondents also indicated visiting other attractions – with a good majority being based outside the city including Kedleston Hall, Calke Abbey and the Peak District". ('S4W VisitDerby report 2013)

Stakeholder Consultation

A summary of the views expressed by stakeholders is included in the main body of the report.

Consultant reports, reviews and available data

In 2013/14, the Visitor Economy Advisory Group (VEAG) to the D2N2 LEP commissioned Colliers Int. to produce a Visitor Economy Review and Investment Study for the area which included a paper detailing recommendations for Derbyshire. The full suite of documents is available here www.visitderby.co.uk/strategies

The key findings made in the documents include the following:

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- Excellent access to Gateway cities inc. Derby (The study draws attention the HS2 as a potential benefit to the area).
- The review recognises Derby as one of a number of visitor hubs, where significant numbers of visitors would head for the available services and to prepare for a visit to the wider area, and as such is an 'extremely important part of the wider visitor experience' at the same time it recognises that Derby, along with other hubs mentioned is also a destination in its own right and as such needs a Destination Management Plan (at the time The Derby Visitor Economy Strategy 2011-2016 was in place). The review goes on to say that "It would be sensible for the LEP to focus any available investment or support on those hubs which are most important." It then mentions Derby as a priority destination/ hub. Recommends support from the LEP investment in a small number of major anchor attractions which are detailed in the Derby, Derbyshire and Peak District Tourism Baseline section of the wider tourism impact study.
- World Heritage Site requires significant investment to meet expectations.
- Derby has a reasonably good cultural offer however, cultural attractions are under threat from withdrawal of funding.
- The report recognises the following as potential visitor attraction developments in Derby:

Derby Silk Mill (To re-open as the Museum of Making), The Derby Arm Project (reopening of 12.5 miles of waterway at Derby Canal with boat lift), a permanent Rolls Royce Museum and more emphasis on the Joseph Wright collection.

Local issues, opportunities and external trends

Culture along with leisure is acknowledged as an important part of the economy (although possibly for its impact on residents rather than its ability to attract visitors) and as such has a Culture Plan delivered by the Culture, Leisure and Tourism Board.

Derbyshire County Council has led on the creation of a Culture, Heritage and Tourism Board (CHaT). It is intended to be representative of the whole region including the city. It will be important to avoid duplication or conflicting agendas and to facilitate understanding of priorities.

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A number of attraction developments in the pipeline have the potential to improve Derby's reputation and increase visitor numbers.

The Museum of Making opening September 2020 at Derby Silk Mill will host events and exhibitions that could be nationally and internationally significant. This could have multiple benefits from place-making (conclusively identifying and telling the unique and authentic Derby story) and delivering overnight stays at the weekend.

The Derby Museums Trust is undertaking research to determine if the Joseph Wright collection should have more emphasis within a specifically named gallery.

Made in Derby is a public realm project which was developed with stakeholders including the Derby Telegraph to celebrate significant Derby residents who have had an impact on the city. Businesses and visitors report that poor signage means many people remain unaware that the cast iron plaques bearing the names are also codes to access virtual reality presentations on the subject's achievements.

Derby Market Hall

The Market Hall roof is currently undergoing essential structural work. Until this is completed and the full cost understood, plans for the development of the product is delayed. The sustainability of the offer depends on the quality and quantity of the stalls and the markets that they will attract.

Moorways Sports Village

Derby City Council will deliver a new swimming pool complex which will open late 2021. The new facility is a £42 million project and will become part of Moorways Sports Village . Facilities include a 50m pool, water park, modern gym plus sauna and steam rooms.

Inside the water park there will be two, four storey flumes plus England's first wave generating wow ball and wave rider slide. These additional facilities have the potential to attract visitors as well as the resident population.

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Dine

Baseline

The dine section on VisitDerby currently lists 83 restaurants 36 cafes 23 pubs and 23 bars. It should be noted that some venues might be duplicated across more than one search criteria and that lists will include restaurants and bars that are inside hotels.

Visitor Research

Analysis of the visitor research shows that the food and drink sector referred to as Dine on the website, accounts for 18% of what visitors plan to do in Derby. A further 10% responded that the nightlife attracted them to the city, which may overlap with food and drink.

Stakeholder Consultation

A summary of the views expressed by stakeholders is included in the main body of the report

Local issues, opportunities and external trends

Derby is attracting travel and tourism media attention based on the developing food and drink sector with a view expressed that the city punches above its weight in this area. The external trend leans towards an appreciation of independent providers with a particular emphasis on fresh, local produce and creative service. By offering a unique experience these eateries can become destinations in their own right.

Derby has an established reputation as a real ale hub. Micro –brewery tours and beer festivals when operating, expand the experience. The city boasts both traditional, historic pubs alongside contemporary refurbishments of older pubs which extend the offer to a wider audience. Craft beer and Real Ale is a strength county wide and offers an opportunity for joint marketing across the wider destination.

What is an existing strength in this sector has been further boosted by the consumer travel trend defined as 'alco-tourism' which see's itineraries planned around visiting, tasting craft Gin, whiskey and local wine producers.

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Tourism Infrastructure

Baseline

Around £1billion of investment predominantly within the city centre has delivered many improvements, including new venues, public realm and highway improvements. This work is ongoing subject to available funding. However, there are areas that still need improvement and the social problems which remain very evident to passers-by and are affecting reputation. These are issues affecting all cities but are concentrated in specific areas within a small city.

Visitor Research

Remarks made in the visitor surveys refer to the city looking shabby. There are remarks about beggars, homeless and being aware of drug abuse. Comments were made to the effect that we have some beautiful buildings but they aren't being looked after/ made enough of. A few comments refer to expensive car parking. There is a strong contrast between the views of (evidently) local people expressing dissatisfaction and the views expressed by travel journalists who see Derby in the context of their wider experience of cities and find that it compares favourably.

Stakeholder Consultation

A summary of the views expressed by stakeholders is included in the main body of the report

Consultant reports, reviews and available data

The Derby Masterplan is due to be refreshed. This is an opportunity to link with the DMP to achieve objectives and deliver on the actions

Local issues, opportunities and external trends

Stakeholders report the need for a vibrant city centre offer through the day and into the evening.

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Transport and access

Visitor Research

Very few comments made about transport. Park and Ride is mentioned as good but not enough buses to get around the city centre.

Stakeholder Consultation

A summary of the views expressed by stakeholders is included in the main body of the report.

Very few of the businesses interview expressed any major concerns about transportation. The comments that were made include:

- Need to consider if and how HS2 might benefit the city.
- Having a 24/7 coach park throughout the year is essential.
- Introduce more pay by card options in car parks.

Visitor Services

Tourist Information, Branding, Marketing and PR

Baseline

There has been a tourism team in the City of Derby for c. 20 years. The team is currently responsible for delivering the DMP plus tourism marketing and the Tourist Information (TIC) aspect of the Sales and Information Centre. (In 2016, the TIC combined with the DerbyLive Box Office to create the Derby Sales and Information Centre). The Tourism Team is currently part of the Derby City Council - Culture, Leisure and Tourism department, in the Communities and Place directorate.

The DCC Tourism Team public facing brand is VisitDerby. This is the DMO for the city leading on the delivery of the DMP which covers both product development and marketing in order to assist the City to develop as a destination, (Destination = somewhere people make a special trip to visit based on what they know or believe it has to offer).

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The VisitDerby team also deliver the destination Social Media strategy which is used both for promotions and as an information service.

www.visitderby.co.uk is the official website for the city and achieves around 1.3 million page views annually. The purpose of the website is to define the visitor experience in Derby by highlighting the key attractions and events available, (particularly those that are unique to the city) and link them with accommodation and other visitor facilities in order to encourage an overnight stay/s and to extend the value of their visit to other businesses. The strategy and strap line, VisitDerby - Great Place, Great Base is intended to identify the unique and authentic experience that differentiate the Place. It also supports the concept of staying in the city as a base to explore the wider area. The website is used by both residents and leisure and business visitors as a source of accurate, up to date information.

National and regional travel and tourism PR is aimed at improving Derby's reputation as a visitor destination by highlighting new accommodation, events and attractions. Through this activity Derby has been reflected very positively online and in print for national titles inc The Guardian, The i, Metro Lonely Planet, Love Travelling and many others having a very positive effect on Derby's reputation as a tourism destination.