

Northamptonshire's Tourism Strategy.

A Strategy for Northamptonshire's
Visitor Economy.



North
Northamptonshire
Council

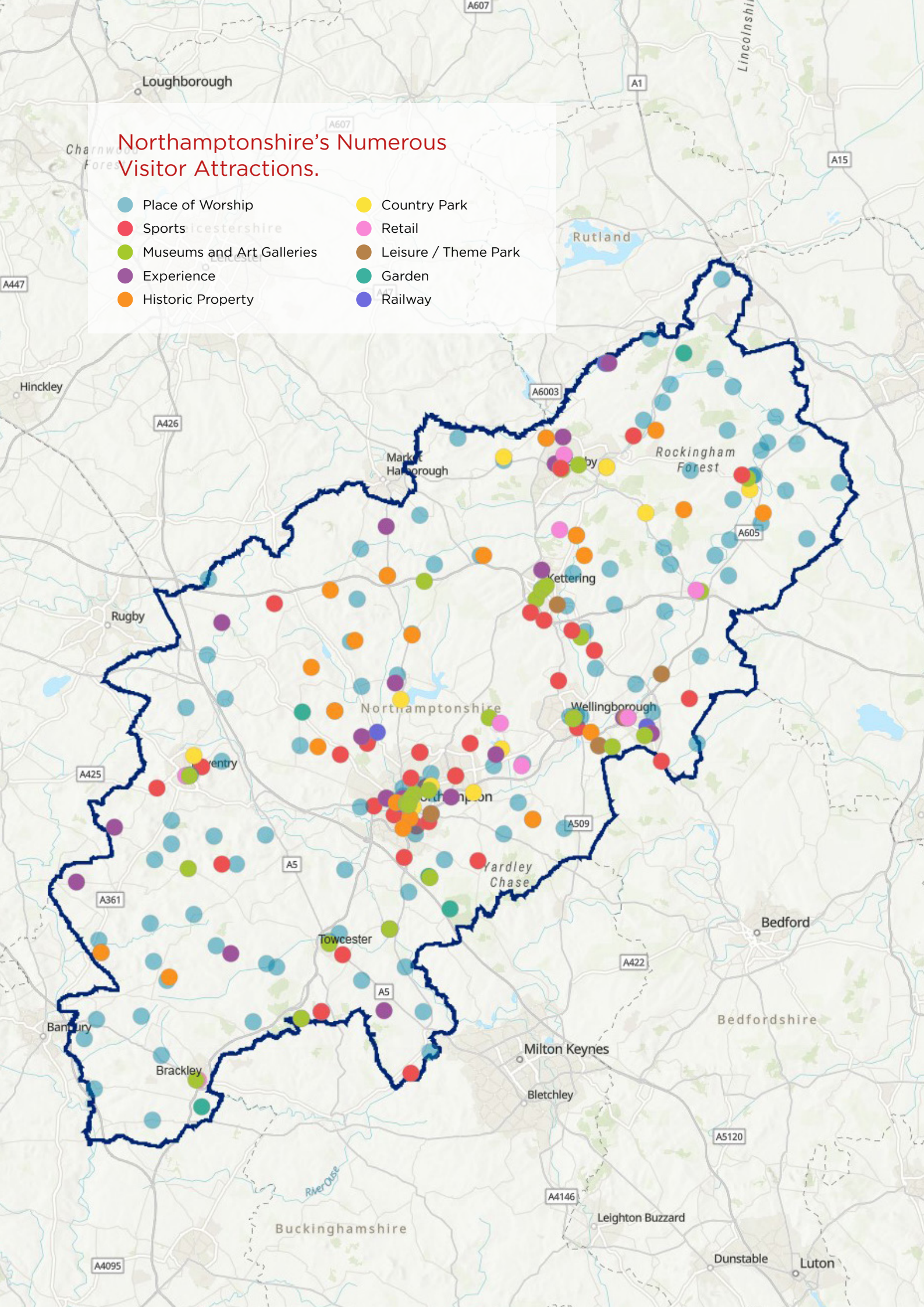


West
Northamptonshire
Council

POWERED BY
**LEVELLING
UP**

Northamptonshire's Numerous Visitor Attractions.

- Place of Worship
- Sports
- Museums and Art Galleries
- Experience
- Historic Property
- Country Park
- Retail
- Leisure / Theme Park
- Garden
- Railway



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Foreword.

Our vision is to build a greater sense of pride across Northamptonshire and drive economic growth by attracting people to visit the county. Through collaborative and creative work across the entire visitor economy, we will provide visitors with compelling reasons to visit and to stay, delivering great times for each and every one. Visitors will leave wishing they had stayed longer and vowing to return.

Our diverse offer gives visitors a huge selection of experiences and activities to enjoy. It covers everything from medieval battlefields to motorsport, from festivals to forest bathing. Our trendsetting accommodation, fit for all pockets will reach new heights of quality and service. Our natural countryside provides many opportunities for visitors to discover new peaceful places as they enjoy a range of distinctive experiences, local food and drink and independent retail, all wrapped up in renowned hospitality.

This strategy is not just about supporting a diverse and attractive offer, it is about how our offer is packaged and presented, and how our industry works effectively together and is supported on its journey towards greater success. It is about developing strong links between people, places and sectors – to better connect up everything and everybody – resulting, ultimately, in the county's visitor economy being way more than the sum of its parts.

The strategy sets out recommended actions on a number of shared priorities to ensure that Northamptonshire's visitor economy can reach its potential while also improving the place local residents call home – making it greener, more accessible and always inclusive and welcoming. The move towards more local tourism and staycations is hard-wired into our goals, which include:



Visits and Value – Increase the number and value of staying visitors from outside the county and encourage day visits from closer to home.



Better Business – Support our visitor economy businesses to grow and to collaborate locally in order to be able to compete nationally.



Great People – Develop local talent into a motivated workforce to fill vacancies, boost standards and increase pride of place.



Inspirational Places – Attract investors to help deliver the further development of this unique, diverse and contemporary offer

This strategy sets out long-term goals and short and mid-term actions that will invigorate the visitor economy and establish a new ambition for the industry in Northamptonshire. We invite you to play a role in delivering it – turning strategy into action – to realise the extensive benefits for the sector, for residents and for an unsung county that represents the best of England.

Cllr. Helen Howell



Cllr. Daniel Lister



Executive Summary.

This Strategy sets out to transform the fortunes of the visitor economy – currently one of Northamptonshire's unsung economic heroes. Developed over an 18 month period this work has uncovered and drawn on a wide range of evidence that has underpinned the approach and content, supported by a wide range of contributors from across the economic landscape including public stakeholders, businesses and the third sector. A number of key factors have provided the basis on which our strategy is built:

- The county has a wide ranging array of natural and built assets and a particularly strong visitor attractions base which can be a foundation for driving new and repeat business but there is also a need for new investment, in for example, accommodation.
- Visitor perceptions of the county are generally positive but awareness is low.
- Partnership marketing is a key that can help unlock the potential – and stronger collaboration is critical to progressing all four strategic goals.
- Sustainability and accessibility are principles that will be woven into the strategy from the start, underpinned by UN Sustainability Goals and best practice access principles.
- Improving the skills of our people and helping youngsters into the workforce is a fundamental cornerstone for future success.

Our strategic goals are to increase the value that visitors bring, inspire a new and skilled workforce into the industry, support local visitor economy businesses to grow and identify future investments that will help further define and boost Northamptonshire's visitor economy over time.

This strategy has been informed and supported by a great many different people and organisations and for successful delivery will need to connect, communicate and collaborate with all local, regional and national stakeholders with an interest. A new private sector-led Local Visitor Economy Partnership (LVEP) will be established, made up of a representative group of senior industry figures, to steer the delivery of this plan and make sure that the potential is realised, focussing on four clear objectives:



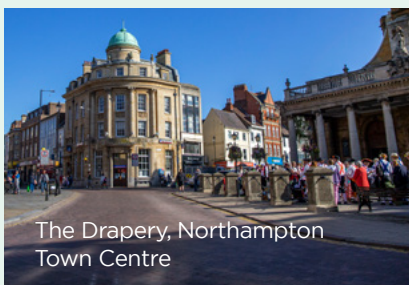
A sharp focus on these objectives by the LVEP will help inform and further develop the Draft Action Plan given at the end of this document. Dynamic and tailored marketing will aim to engage and welcome more visitors from far afield but also stimulate a vibrant local market to take more trips in the county, locking in wellbeing benefits for communities and residents alike. There will be a greater effort to join up policies in support of the visitor economy with for example new forms of accommodation, such as glamping sought after by newer markets, prioritised in some of our best blue and green areas, with those areas also better linked by path networks and new travel options. Supporting businesses in their journey towards being ambassadors for the place will help ensure visitors return time and again.



SECTION 1.

Lyveden

Introduction.



The Drapery, Northampton Town Centre

The visitor economy will play a significant role in the future development of Northamptonshire's economy, generating revenue and creating jobs for local people, supporting numerous sectors such as hospitality, transport, food and beverage, retail and events. It will also boost the regional economy, underpin local start-up businesses and help support investment in infrastructure that is of benefit to both residents and visitors. It contributes to the preservation of cultural heritage, encourages the conservation of local sites and gives both

residents and visitors the opportunity to experience a wide range of experiences and activities. The visitor economy has the potential to enhance the quality of life of residents, encourage regional, national and international visitors to the county and is part of what makes this area unique.

Our strategic approach to nurture the county's visitor economy will lead to a wider range of benefits for local communities, businesses, residents and visitors. By identifying and capitalising on the diverse, and often unique offer, we can better pinpoint where investment is best applied. Our strategic approach can help to manage the impact of tourism on the environment and conserve the natural and cultural assets that attract visitors in the first place. Additionally, it will stimulate a stronger connection to other policy areas and foster closer collaboration between public, private and voluntary sectors, leading to a more cohesive and coordinated effort to promote our attractive but currently under-utilised destination. Ultimately, our well-planned and executed strategy, underpinned by timely and accurate data, will create long-term sustainable growth. This document is the guiding framework that will enable this to happen.

Current Performance.

National statistics show over 18 million visits to Northamptonshire spending close to £1 billion a year¹ which supports over 30,000 jobs across the county and 3,000 businesses², including a wide range of attractions, hotels, pubs and other venues that visitors enjoy. People come to explore local attractions, picturesque countryside, travelling for leisure, on business and to meet family and friends. They spend money in shops, at events and in bars and restaurants. With around 99% of local businesses being SMEs² this spending supports many small, local and start-up businesses which add a distinctive flavour to many parts of the county, across our towns, villages and countryside. The fact that the visitor comes to enjoy the experience is clear, but this is also what differentiates the visitor economy from most other industries. It drives local spending, local impact and a *flow-through effect* where visitors' spending creates a virtuous circle as it is re-spent in other parts of the county's economy.



Table - Summary of Market Size.

Visit Type	Volume (million)	Share	Value (million)	Share
Domestic Day Visits	16.1	88%	£523	50%
Domestic Overnight Visits	2.0	11%	£450	43%
Inbound Visits	0.12	1%	£63	6%
Total	18.3		£1,035	

Over 2 million domestic visitors a year typically stay in the county, of which 74% stay in West Northamptonshire, reflecting the larger geographic area and also easier access. West Northamptonshire draws 71% of total overnight spend which reflects the type of accommodation stock.

A Market Review, undertaken to inform this Strategy, using 2022 data indicates that Northamptonshire's visitor economy is marked by a more local catchment than other, perhaps more established, tourism destinations. As well as attracting visitors from further away, a pillar of this strategy is also to play to this strength by developing ways in which people who live in and around the county can also benefit from enjoying such a diverse and exciting offer on their doorstep and in so doing stimulate the potential to expand the reach of visitors.

Footnotes:

1. VisitBritain (2023) Great Britain Tourism Survey (GBTS); Visit Britain (2023) Great Britain Day Visits Survey (GBDVS); Office for National Statistics (2023) International Passenger Survey.
2. Office for National Statistics (2023) Business Register and Employment Survey.

A note on the statistics used in this document.

The Covid-19 pandemic severely impacted the visitor economy across the world and another casualty was national research that tracks visitors to and around the UK. Without visitors arriving, surveys of travellers inbound to the UK and those that measure domestic tourism were halted. Further lockdowns in early 2021 meant more gaps in the data and it was only in 2022 that the national surveys fully restarted – but on a different basis so breaking the trend. *When reporting volume and value for domestic overnight tourism and day visits we refer to 2021/22 data as the baseline year.*

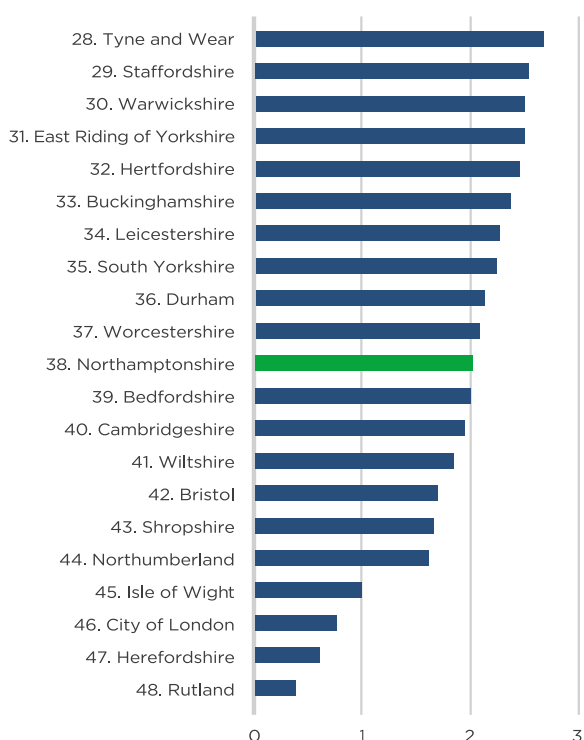
Other Office for National Statistics sources, reporting on areas such as employment levels, were drawn from the most up to date data available at the time. An additional market review drew on big data sources, reflecting visitor activity in 2022.

Much of the partnership marketing activity proposed should therefore play to this local strength and highlight to people who live in and around Northamptonshire how they can benefit from having such a diverse and exciting offer on their doorstep. More local visitors will also bring other benefits, such as encouraging new local food and drink producers and suppliers to the market.

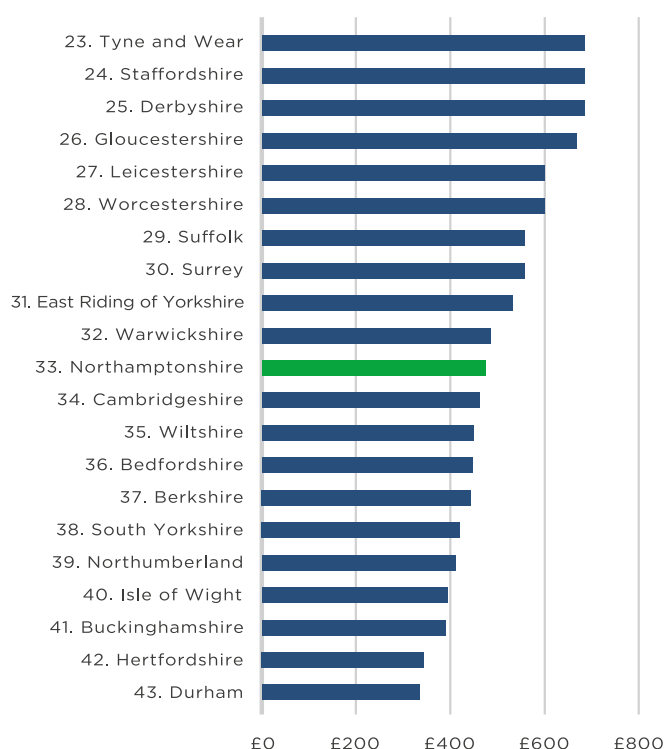
In terms of total domestic overnight trips, the county is in 38th place in the England league table (out of 48) but in terms of spend per trip the county is in 33rd place showing a positive tourism performance³. Encouraging further numbers of people to stay rather than come for the day will help drive greater economic impact. Our aspiration is to improve our league table position by growing the value of visitor spending, converting day to stay, and seeing tourism benefits spread across all parts of the County at all times of year. In comparison with the top achieving areas, Northamptonshire is approximately 5 million lower in terms of trips volume annual average.

Northamptonshire's Place in England's Tourism League Table.

Counties League Table - Total Tourism Visits (m)



Counties League Table - Tourism Spend (£m)



Footnote:

3. VisitBritain (2023) Great Britain Tourism Survey (GBTS).

The county welcomed some 150,000 international visitors in 2022⁴ and business travel is a buoyant part of that mix. Five core inbound markets to the county mirror national trends but Northamptonshire outperforms England in relation to visitors from the USA and Spain - that is there are proportionally more visitors to the county from these markets than to the UK as a whole. There are opportunities to bolster these core overseas markets with a wider programme of travel trade activity including building trade and press relationships, attendance at FITUR⁵ and partnerships with VisitBritain.

Table of Top 20 (of 64) Overseas Markets to Northamptonshire.

County	Northants Share	UK Share 2019 Visits	Relative Position
USA	15.8%	11.9%	3.9%
Spain	9.0%	6.1%	2.9%
Germany	8.3%	8.6%	-0.3%
France	6.6%	9.4%	-2.9%
Netherlands	5.8%	5.3%	0.6%
Romania	4.1%	2.4%	1.7%
Ireland	3.9%	7.6%	-3.7%
India	3.4%	1.8%	1.6%
Italy	3.4%	5.8%	-2.4%
Australia	3.2%	2.8%	0.3%
ARE	2.2%	0.3%	1.8%
Moldova	2.2%		No IPS data
Poland	1.9%	4.4%	-2.4%
Russia	1.7%	0.0%	No IPS data
Turkey	1.5%	0.9%	0.6%
Belgium	1.2%	3.0%	-1.8%
Mexico	1.2%	0.4%	0.8%
Nigeria	1.2%	0.6%	0.7%
Saudi Arabia	1.2%	0.6%	0.6%
Hungary	1.0%	0.9%	0.1%

Source: Tomorrow's Tourism. Sample of overseas visitors to 4 locations in Northamptonshire visiting from 1 Jan 22 - 31 Dec 22

Current performance leads us to conclude that over the longer term the strategy needs to consider investment in other new primary reasons to visit which should be explored and piloted within the first three years of delivery activity. This will generate greater trip-taking from further afield. Action will support the examination of a range of transformational projects aimed at either business and/or leisure markets. These *new reasons to visit* will over time create new market growth, longer-stays and higher spending per head and drive economic prosperity for the local area, benefitting both businesses and residents in the county.

If Northamptonshire's visitor economy had grown over the past decade at the same pace as our neighbours in Cambridgeshire it would have resulted in £36m more spending by overnight visitors and some 660 jobs either safeguarded or created. This strategy aims to move the county up the league table and deliver this potential.

Footnotes:

4. Office for National Statistics (2023) International Passenger Survey.

5. The major international tourism trade fair held in Madrid in January of each year.

Northamptonshire's Visitor Economy Asset Base.

A comprehensive geo-located asset audit revealed that there are 4,478 establishments across the county, covering accommodation, food and drink, attractions, retail, sport & entertainment, festivals, events, and meetings and conferences.



Accommodation – The audit showed the county's split of 561 serviced/non-serviced accommodation establishments is about average in density terms for England, although West Northamptonshire is particularly strong in terms of serviced stock such as hotels, B&Bs and pubs. Northamptonshire as a whole has a higher-than-average number of branded budget hotels, with particular clusters in West Northamptonshire often near to major road arteries. The majority of the larger hotels, non-serviced accommodation and campsites are also in West Northamptonshire. Both North and West Northamptonshire have an undersupply of city/town centre serviced accommodation when compared to the Great Britain average.

Bar Chart of Accommodation Stock – Trend 2016 & 2022.

■ 2022
■ 2016

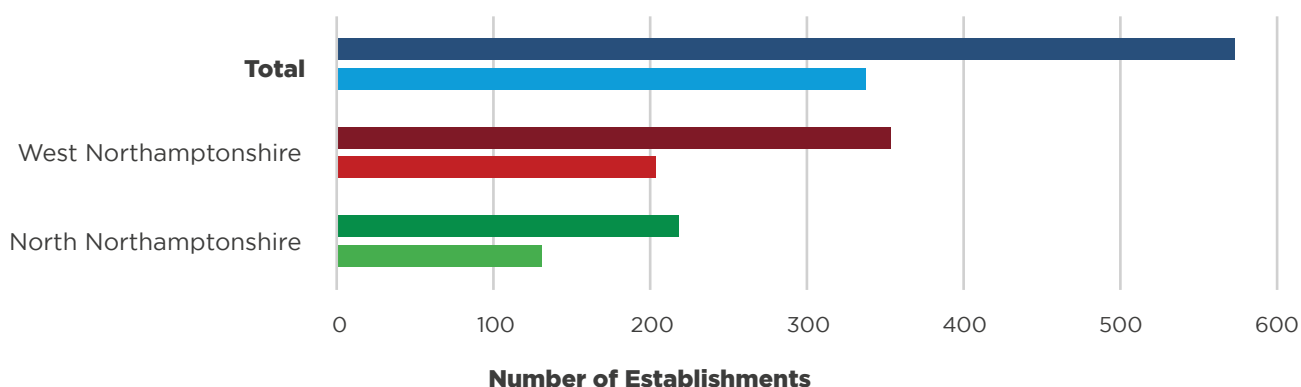
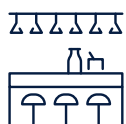


Table showing the change from 2016.

Sector Trend - Northamptonshire	2016	%	2022	%	% change
Accommodation – Serviced	267	79%	194	35%	-27%
Accommodation – Non Serviced	71	21%	367	65%	417%
Total	338		561		66%



Restaurants and cafés dominate the food offer, with a number of mobile caterers also operating at the county's festivals and events. As would be expected the distribution of the county's 1,321 restaurants, cafés, pubs and nightclubs is more uniform across the study area with population centres seeing greater numbers, shown particularly in Northampton and Kettering. North Northamptonshire has an undersupply of catering units whereas West Northamptonshire has an oversupply when compared with the GB average.

As a broad and 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 more reliant on visitor income depending on their location. Quality, when measured against the Food Standards Agency's scheme, sees 81% of establishments in the county receiving the highest score with North Northamptonshire having a higher proportion of establishments achieving these high scores.



Visitor attractions – There is an even distribution of the county's 184 visitor attractions across the county, with clusters around the main centres of population and relatively more in the West than the North. A further 111 churches continue to hold an interest for a niche market, reflecting a strong historic heritage. Experiences dominate the visitor attractions sector, with historic houses and other properties, museums and country parks also remaining popular. Golf clubs, as well as spectator sports (particularly racing and motorsport activities, as well as first-class cricket and premiership rugby), remain an important both for the local visitor and as a trip motivator for those further afield. This asset class is high quality, a credit to the county and benefiting from easy access by a wide market catchment.



Daventry High Street



Retail – The county has a strong retail offer with 773 independent shops and 945 multiples. The West has a greater number of independent shops while the North more multiple retailers. Shops and amenities make up 46% of supply, food and drink 37%, and clothes and fashion retailers 12%. The urban centres host much of the retail, both in terms of comparison and convenience categories. Rushden Lakes attracts some 7 million visits a year with the North generally attracting more day visitors while the West attracts more staying visitors.

In terms of quality of the retail offer over the last five years, Northamptonshire has been below the national average in the percentage of both Premium and Mass retailers, but above average for the Value offer. West Northamptonshire has a slightly higher quality retail offer.

Overall, the North/West split in **entertainment** venues is very even. A total of 257 (57%) of pubs, bars and nightclubs are located in West Northamptonshire, many of these being located in Northampton.



Festivals and events are an important component of Northamptonshire's visitor economy, with 256 events annually distributed evenly across the area, though with a pronounced nucleus in the urban centres. The size and scale of events is varied with the larger flagship events (such as Formula 1 and Moto GP at Silverstone) attracting hundreds of thousands of people and having significant economic impact. However, these remain outliers and there are many attractions that only run one or two events each year but which nevertheless are important as part of a diverse visitor economy, helping local communities showcase themselves and providing social benefits for residents as well as visitors.

Case Study:

Winterjazz: A 3-week-long musical feast in Copenhagen, Denmark.

During the course of the 10 days the total audience numbers reached more than 250,000 people. Visitors are divided evenly among the age groups 0-35 years, 36-55 years and 56 years or older. Nine out of ten visitors are Danish. Foreign visitors are primarily Swedish, Norwegian, German, British and American. Established in 1979, 10 days, 100 venues, more than 1,200 concerts. One of Europe's biggest jazz festivals. Always starts the first Friday of July and last 10 days. The concerts takes place at clubs, cafes, bars, concert halls and open-air stages in the city's parks and squares and along the harbour front.



Meetings and conferences can deliver high economic impact. The county's location is a huge advantage for business tourism – particularly footloose corporate meetings, conferences and events. Northamptonshire prides itself on being easy to reach and a great place for business. The reality is that the current business product does not always support this objective in terms of higher value, large conferences and exhibitions. The county does benefit from proximity to the M1 and the increase in pubs with meetings capacity has helped sustain a smaller meetings market which can be developed further.

Summary of the Supply and Demand in Northamptonshire by Unitary and Asset Category.

TABLE 1	North Northamptonshire		West Northamptonshire		County ¹		
Assets by Unitary	Nos	%	Nos	%	Nos	Index	%
Accommodation	213	38.0%	348	62.0%	561	W	+3.7%
Festivals & Events	119	44.7%	147	55.3%	266	N	+3.9%
Mobile Caterers	161	41.6%	226	58.4%	387	=	+0.1%
Pubs, bars, nightclubs	196	43.3%	257	56.7%	453	N	+1.6%
Restaurants, Cafés	321	37.0%	547	63.0%	868	W	+4.7%
Retail Independent	365	47.2%	408	52.8%	773	N	+5.5%
Retail Multiple	505	53.4%	440	46.6%	945	N	+11.8%
Sports Venues	15	36.6%	26	63.4%	41	W	+5.1%
Visitor Attractions	93	50.5%	91	49.5%	184	N	+8.9%
Visitor Economy	1,988	44.4%	2,490	55.6%	4,478		

TABLE 2	North Northamptonshire		West Northamptonshire		County	
Demand – 2019 Baseline	Nos ('000)	£m	Nos ('000)	£m	Nos ('000)	£m
Domestic Tourists	257	29	573	79	830	108
Domestic Day Trips	7,670	195	7,150	208	14,820	403
Inbound Tourists ²	99	25	120	31	219	56
Total	8,026	249	7,843	318	15,869	567

Footnotes:

1. The index relates to both population and land area and indicates the position of each Unitary relative to the other against each asset category. For example, North Northants has 8.9% more visitor attractions than might be expected on the basis of population and area.
2. The split of Inbound tourism demand estimated on the basis of the combination of Unitary area population.
(NN 45% / WN 55%)

The figures in Table 2 relate to 2019, the last year where robust figures are available. Trends in domestic tourism and day visits in 2021/22 have supported significant growth from 2020. Inbound tourism has been slower to return and has been of a different nature. Sources: International Passenger Survey (ONS), Great Britain Tourism Survey and Leisure Day Visits Survey (VisitBritain).



Visitors' Perceptions of Northamptonshire.

A representative sample of 1,000 people from across the United Kingdom were quizzed on their perceptions of Northamptonshire along with their expectations and actual experiences. The awareness of the county is limited. Whilst people may know roughly where it is, spontaneous associations are most likely to be 'Northampton', 'Silverstone' 'countryside' or 'nothing'. The ease of access is generally recognised with the principal road network well understood. At the heart of the challenge therefore is a simple lack of knowledge about what the area has to offer. The county's land-locked location, with other counties on all sides, doesn't help with clarity, nor does the strength of the offer in many of those neighbouring counties. This in itself presents an opportunity for Northamptonshire in promoting and marketing a wider offer to build and raise awareness.

There is no tangible difference in views between those who would wish to visit West Northamptonshire or North Northamptonshire or how either audience perceive the county. This lack of difference in awareness of places and interest in visiting the various attractions combine to suggest that knowledge of the area is not strong enough to drive differentiation at this stage. Such insight strongly supports the decision for both councils to work together as more will be gained for both areas through collaborative promotion of the whole area.



Rockingham Castle courtesy of Adam Balcomb



Northampton Saints

To strengthen Northamptonshire's position as a leisure destination, it is important to convey a clear message of what there is to see and do. Whilst awareness and knowledge are low, perceptions are generally positive. Importantly, there are currently no actively negative associations with the area and so the focus should be on giving clear 'reasons to visit' and ensure that information and inspiration are easily accessible to prospective visitors. The potential to develop local itineraries or suggested combinations of trips that string elements of the stay together could be beneficial. Such a position supports collaborative efforts generally and partnership marketing in particular.

The country is seeing a cost-of-living crisis and central bank forecasts suggest no significant GDP growth until 2026. So, the medium-term outlook is constrained with visitors seeking out cost-effective trips and looking for new ways to spend leisure time. Northamptonshire is not perceived to be expensive and has affordable accommodation and visitor attractions. The parks, landscapes, villages and other amenities can offer many low-price or free family activities. Taking advantage of this current challenging economic context is built into the Draft Action Plan.



The Views of Businesses and Stakeholders.

Some 500 individuals responded to surveys aimed at three different Northamptonshire audiences:



Businesses drew attention to a challenging macro-economic business environment and noted specific challenges such as securing the necessary investment and staff / recruitment difficulties.

Opportunities identified were usually specific to individual businesses but more general ideas included widening the attractiveness and awareness of the area, increasing the independent retail offer and developing new arrangements for marketing and promotion.

Stakeholders believe the most important intervention needed to realise a new vision should be a focus on people and organisations working effectively together and better connecting activities relating to the visitor economy to the Councils' other strategic and development priorities. Diverse partnerships to improve outputs and delivery, and longer-term capital-intensive strategic interventions, were also deemed important.

In terms of strategic priorities, improving marketing and promotion ranked highly for both businesses and stakeholders, followed by a drive to become more accessible and sustainable, and improving collaboration between public and private sectors. Stakeholders also noted the importance of skills and workforce development, town centre investment, support to local businesses, improvements to the visitor experience and the need to ensure benefits to local communities and residents.

“A general lack of joined up thinking and sustainable planning by relevant authorities which would provide opportunities for local suppliers & traders.”

Respondent, February 2023

“Investing in a range of activities to populate a year-round programme of arts and cultural events and supporting organisations to attempt larger scale cultural projects with ambitions for drawing larger crowds from further afield would be a positive element of the strategy moving forward.”

Respondent, Survey of Visitor Attractions, August 2022

The Views of Residents.

In terms of the benefits brought by a thriving visitor economy, residents concluded that it gave an opportunity for resources for environmental protection – whether that was conserving natural resources, improving biodiversity or protecting special places. They also saw the same type of opportunity to support the cultural fabric of the place, noting also that economic benefits included investment in the public realm – an opportunity where the visitor economy can contribute for mutual benefit. Top concerns were litter, overcrowding and instances of different types of visitors clashing, such as cyclists and drivers.

A variety of product strengths were identified by all respondents including the special nature of the county, its river, the history, heritage, stately homes, and the cultural environment.



Chester House

The Policy Context.

Like other sectors, parts of the visitor economy are currently suffering from difficulties in recruitment, but this masks other more underlying structural challenges including securing clear and attractive employee pathways; encouraging all employers to be dedicated to upskilling and retaining people; and to supporting an educational system that is fully motivated to developing the talent pipeline.

This is not just a Northamptonshire or regional issue and reflects the impacts of both Brexit and the Covid pandemic. The former cut off a pipeline of ready workers from eastern Europe while Covid meant staff left the workforce and have not returned. The strategic implications of these trends are profound, both for individual businesses and the sector as a whole.

This strategy will connect closely and in partnership with Northamptonshire's new Local Skills Improvement Plan where businesses will have a strong voice in local skills planning by working closely with further education providers, local leaders and other stakeholders. The councils also include promotion of better training, further education and employment opportunities for young people in their priorities for the future. Improving training and skills for the sector, and tackling the underlying structural issues is an important part of this strategy.

Northamptonshire as a whole has successfully secured over £10m of funding from the UK Shared Prosperity and Rural England Prosperity Fund to be delivered by March 2025. The funding will contribute to a variety of visitor economy projects including:



Events to attract visitors to High Streets.



Support for new business start-ups and continued support at all stages of development.



A new Visitor Centre at Rushden Lakes.



Driving employment growth, with tailored support and training to help people into work.



New and improved cycleways and paths, resulting in increased active travel.



Employment support for the existing workforce to upskill.



Decarbonisation and improving the natural environment.

A Local Visitor Economy Partnership for the County.

In partnership, private sector representatives, the two local authorities, local stakeholders and more will look to secure Local Visitor Economy Partnership accreditation, working with a range of other local and regional partners to deliver more joined up support for the sector and drawing on other expertise from organisations, such as VisitEngland. As an officially recognised partner, accreditation will allow the county to forge better connections to national partners, participate in national and international campaigns, foster peer to peer networking and allow Northamptonshire easier access to Levelling Up and other government funding.



Brackley Town Centre

UK Consumer Trends and Tourism Trends.

Domestic tourism has seen a steady rise in the United Kingdom in recent years, with more and more Britons opting to stay closer to home for their holidays. This trend has been driven by a range of factors, from Covid to cost considerations, to a desire for safety, authenticity and less carbon intensive travel options. With the pound weaker against other currencies and ongoing economic uncertainty, many people are likely to devote a greater proportion of their income to more practical expenses. According to VisitBritain's Domestic Sentiment Tracker, two thirds of people are concerned about the cost-of-living crisis, with retirees and older independents the most pessimistic. This is likely to encourage people to take fewer trips, choose cheaper accommodation, look for more free things to do and spend less on eating out. Most consumers are planning to spend less on holidays this year. This typically favours domestic travel and other value travel options and, given wider growth forecasts, is likely to persist through to 2025, resulting in a unique opportunity for Northamptonshire to capitalise and benefit from the current economic climate.

One of the key drivers of domestic tourism in the UK is the sharing economy. The rise of platforms such as Airbnb and VRBO has made it easier and more affordable for people to travel within the country. These platforms provide a range of accommodation options, from budget-friendly apartments to luxury homes, which cater to the different needs and preferences of travellers. Digitalisation, the growth of AI and travel apps will continue to provide more immersive and interactive experiences at booking stage, within destination and at review stage. Remote working offers more options for increased 'Blesisure' (part business travel, part leisure travel) that combines both types of trips in different ways.



Nene Valley Festival



Daventry Country Park



Braunston Canal

Another factor that has contributed to the growth of domestic visitor trends in the UK is the availability of affordable travel options. With low-cost public travel, it has become easier and more affordable for people to travel within the country. This has encouraged more people to take weekend and short breaks, or visit friends and family in different parts of the country, although higher fuel prices are likely to be a dampening factor for those not using public transport.

Moreover, many people are looking for unique and authentic travel experiences, which is also driving domestic tourism. The county has a rich cultural heritage, and offers a range of experiences, from historic landmarks to unspoilt countryside. Tourists, particularly Millennials and Gen Z, seek experiences that are off the beaten path and are willing to travel to new areas to find them. This combined with the increasing popularity of outdoor activities has seen more people taking advantage of the opportunity to experience the UK's landscapes in a more active and engaged way. With countryside that is relatively unknown yet accessible, these trends favour counties like Northamptonshire and can be exploited by a digital-first marketing plan that prioritises social media channels to reach new audiences.

The glamping and outdoor holiday market has grown rapidly over the past decade, due to a focus on nature and wellness and the rise of both social media and the experience economy. A trend towards structures like cabins that can provide year-round occupancy, together with a shift towards longer stays of higher value, mean that glamping is no longer only a summer option, increasing its potential. Consumer behaviour has shifted to a longer booking season and demand for greater flexibility in booking terms. Accommodation and experiences centred around Northamptonshire's trails and countryside, including the River Nene can directly meet this trend.



Glamping on the River Nene with Canoe



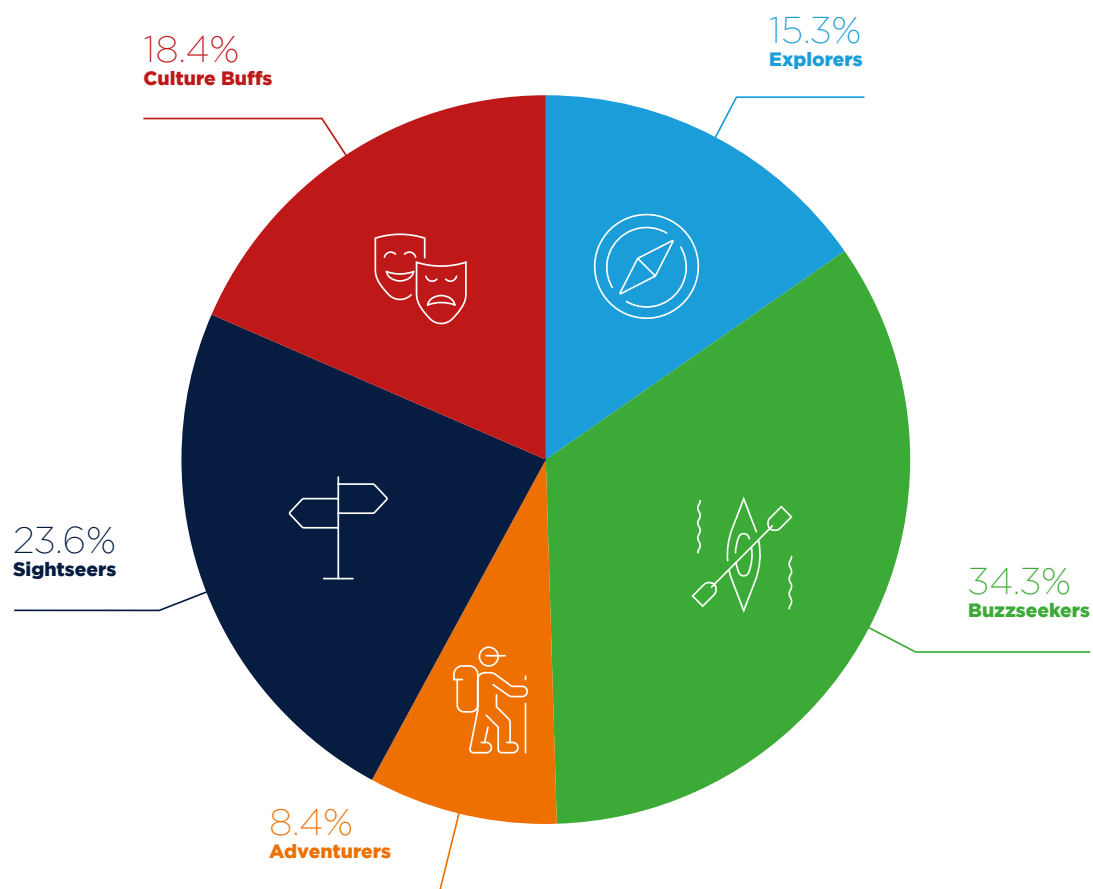
Stanwick Lakes

There is also a growing consumer concern about the climate crisis and a reported willingness to travel closer to home to reduce the carbon footprint. Consumers' growing environmental concerns also tie in with a consumer commitment to improve wellbeing and increased demand for greener wellness travel options. Beauty/spa treatments are the most sought-after wellness holiday activity with healing, nature-based wellness holidays becoming increasingly popular. These holidays offer a connection with nature, outdoor activities and foster environmental awareness. They appeal to those concerned about climate impact by prioritising well-being while minimising the ecological footprint. In recent years, the UK has also seen a surge in popularity of staycations. Partly this trend has been driven by the desire to spend more quality time with family and friends, as well as to escape the hectic pace of everyday life. Overseas holidays are less likely to be taken than UK holidays due to the current cost-of-living crisis meaning an element of UK based 'staycation' preference is likely to continue.

VisitEngland research suggests that domestic overnight travel is returning to pre-pandemic levels, although the cost-of-living crisis has had an impact on day trips with 44% of the public stating they may reduce or stop taking them. However, the impact of personal finances in reducing day trips is counter-balanced by consumers that are increasingly 'comfortable' post-Covid with everyday activities and who discovered many more local destinations during the pandemic. As a result, VisitEngland reports a rise in most day-trip activities compared to 2021, with the exception of trips to 'outdoor parks or scenic areas' – a destination type that was very popular throughout the pandemic.

Among those considering visiting Northamptonshire, Buzzseekers are the biggest opportunity.

Pie chart Market Segments visiting Northamptonshire.



Footnote:

Weighted averages based on the responses of people who would consider visiting Northamptonshire - VisitBritain Segmentation / Sample c1000 UK residents



SECTION 2.

Northampton Saints Fans

Our Vision.



Build a greater sense of pride across Northamptonshire and drive inclusive economic growth by attracting more people to visit.



Provide visitors with compelling reasons to repeatedly visit, stay and spend by working collaboratively and creatively across the entire visitor economy.



Visitors will leave wishing they had stayed longer, telling everyone they know about Northamptonshire and vowing to return time and time again.



VISITS & VALUE

Increase the number and value of staying visitors from outside the county and encourage day visits from closer to home.



GREAT PEOPLE

Develop local talent into a motivated workforce to fill vacancies, boost standards and increase pride of place.



BETTER BUSINESS

Support our visitor economy businesses to grow and to collaborate locally in order to be able to compete nationally.



INSPIRATIONAL PLACES

Attract investors to help deliver the further development of this unique, diverse and contemporary offer.

With this strategy in place, the visitor economy is set to make a growing contribution to Northamptonshire's overall economic prosperity, providing income and jobs, boosting the rural economy and helping underpin our commitment to net-zero. The visitor economy is already important supporting some 3,000 businesses employing over 30,000 people but it can work smarter still given clear leadership, clarity on the priorities, and concerted collaborative actions.

This strategy provides the opportunity for wider impact and benefits of economic prosperity and pride of place to be harnessed. These wider benefits will align to our Northamptonshire Integrated Care Strategy, Live Your Best Life Ambitions, and the work beneath this within our Health and Wellbeing Boards and Local Area Partnerships.



Oundle Town Centre and Shops

The Scale of Northamptonshire's Visitor Economy.

Tourism is already important to the county. A mix of 560 accommodation businesses and 180 high quality visitor attractions combine with other parts of the visitor economy to drive spending of £1 billion a year with over 18 million visits.¹

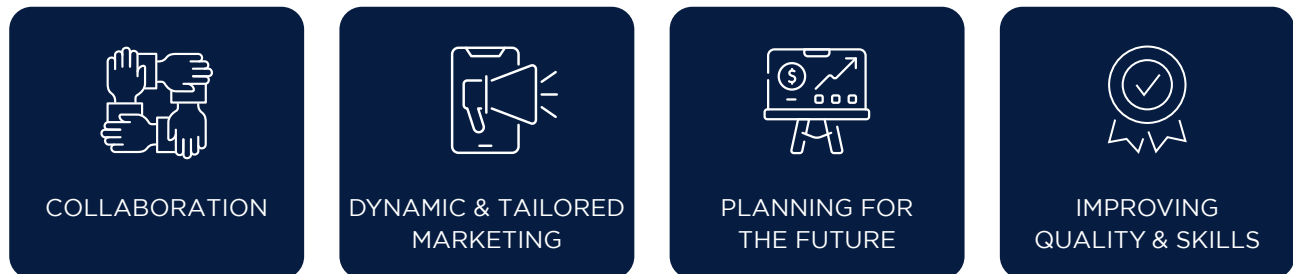
This supports 30,000 jobs and 3,000 businesses across the county, the majority of them small businesses rooted in their local community.²

Footnotes:

1. VisitBritain (2023) Great Britain Tourism Survey (GBTS); Visit Britain (2023) Great Britain Day Visits Survey (GBDVS); Office for National Statistics (2023) International Passenger Survey.
2. Office for National Statistics (2023) Business Register and Employment Survey.

Core Objectives.

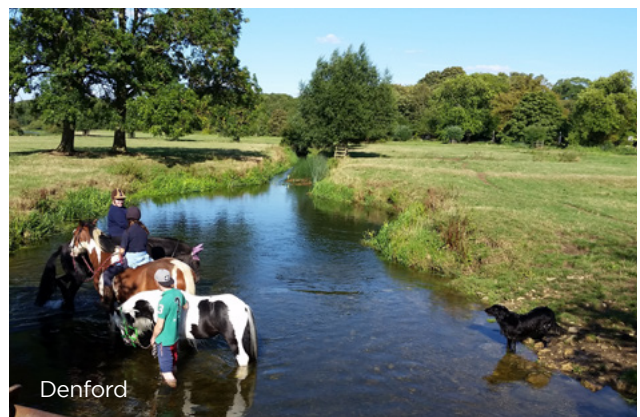
Four core objectives will help deliver our high level goals of increasing visits and value, creating inspirational places, great people and better businesses.



These objectives are covered in detail in the following pages. All our work will take account of the twin cross-cutting themes of sustainability and accessibility. For action on sustainability, this document aligns to ten of the UN's Sustainability Goals, where the strategy can directly contribute to the aims of, for example, good health and wellbeing, education, work and economic growth, sustainable communities and climate action.



<https://sdgs.un.org/goals>



For action on accessibility, we draw inspiration from three principles of accessible tourism: ensuring that all our customer-facing activities deliver the right information; that facilities fully meet customer needs; and that there is plenty of responsive and well trained staff who understand the needs of visitors with different impairments.

Our objectives and cross-cutting themes reflect feedback gained throughout an in-depth research phase and backed up by interviews with senior leaders, surveys of visitor attractions, tourism businesses, residents and stakeholders, together with industry gatherings, workshops and consultation events.



Our Approach to this Strategy's Development.

The development of this strategy has been guided by an evidence-based approach which has included significant primary research examining the county's visitor profile, the asset base (its 'product'), planning policy, economic and employment impact, perceptions of Northamptonshire together with an assessment of the way the visitor economy is organised in other parts of the country. We think this is the first time that such a range of insight specifically for the county has been drawn together and it provides us with firm foundations on which to build.

Cross Sector Collaboration.

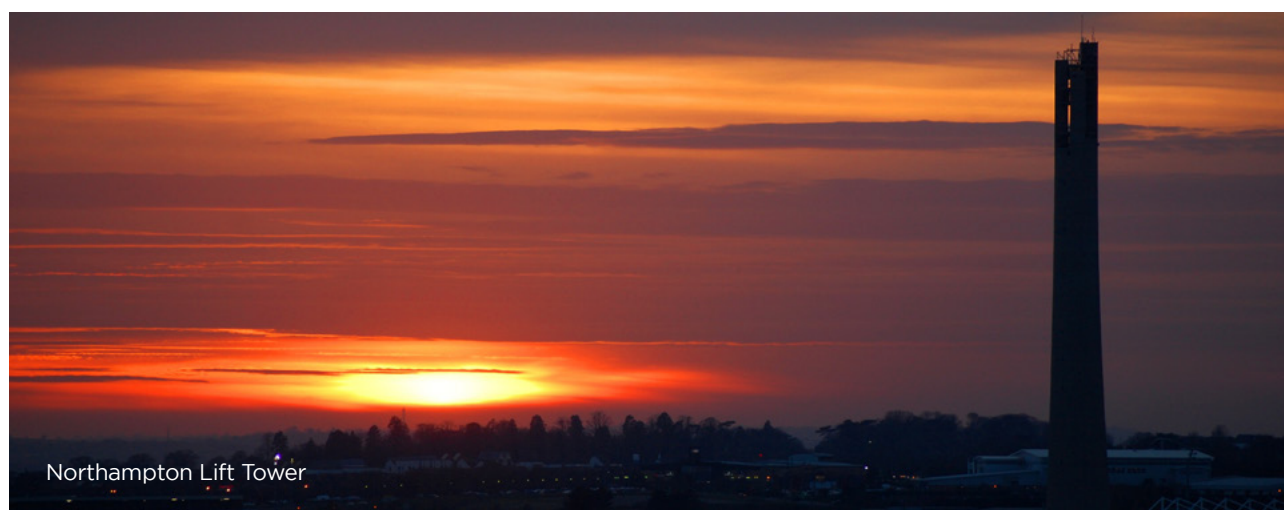
Collaboration is at the heart of this Strategy.

Collaboration is embedded across the Strategy with new measures to be developed and agreed to ensure effective delivery, reduced duplication and to promote a culture of high performance across the network. This will include supporting existing partnerships, developing new approaches where needed and adopting the latest technology to keep groups informed and on track. It will mean regular conferences, events and training sessions, and ensuring that ownership for delivery is organised at the right level, accountability is clear and success measures are agreed and monitored.

Both councils have identified that policy development for the visitor economy needs to use the county as the defining unit. Tourists know nothing about administrative boundaries but recognise counties and research has backed up the logic for us to work together in support of the whole county. This was particularly evident in the survey of consumers undertaken as part of the initial research phase. Strong coordinating measures have been put in place to make joint working timely and effective and both authorities are keen to encourage a range of partnerships and activity. Related work on broader visions for both areas is underway and will inform the direction set out in this strategy.

After some turbulent years, not least the Covid-19 pandemic, the time is right to rejuvenate working relationships to harness the full extent of an acknowledged, but largely unrealised, opportunity. This spirit of partnership will be extended across the public, private and voluntary sectors, both in the county and beyond our boundaries where this makes sense. But it is closer to home where we need to start, establishing new ways of connecting where we know many partners are keen to work collectively to realise the potential. A survey of businesses and stakeholders indicates widespread agreement that a focus on people and organisations working effectively together is critical to realising our Vision.

In Year 1, we will establish a new Local Visitor Economy Partnership to oversee the delivery of this strategy, which initially will be serviced by the two Councils until its governance and other arrangements are formally established. Recruitment to an official Board, and of a Chair, will be subject to an open process and will seek to secure a diverse group of experts drawn from a range of backgrounds. The Board's role will reflect national and local requirements and encompass the broad range of priorities as set out in this document including marketing activity, support to businesses, skills and workforce development, product development and resource management. The Draft Action Plan set out in the Appendix may evolve after scrutiny by the new Chair and Board.



The LVEP Board will wish to review the ways in which collaboration can be enhanced across and between public, private and voluntary sectors. Drawing on suggestions made as part of the recent consultation this may include:



An annual visitor economy conference.



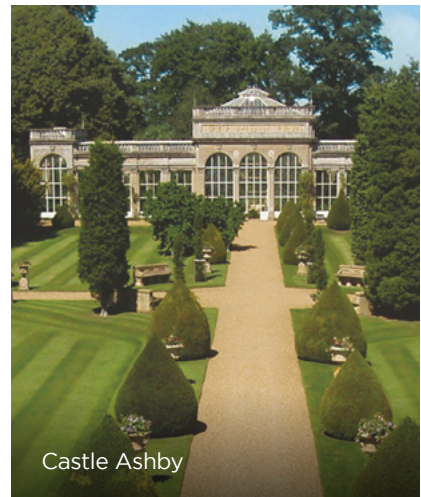
A dedicated network for our visitor attractions given the strength of this sector and the opportunities it gives for local tourism and extending the length of stay.



A high-impact Northamptonshire Marketing Group with the remit to strengthen collaboration, energise and activate a new brand, and produce the right insight to deliver effective marketing arrangements.

Staff from the two councils will be dedicated to support these new working arrangements with resources devoted to partnerships, delivery and evaluation. The arrangements will be fully aligned to national objectives and have the support of VisitEngland, reflecting the new Local Visitor Economy Partnership for Northamptonshire.

The strategy roll-out from the launch stage needs an appointed Board to manage the process and include members experienced in all areas of tourism management, business and local government. Industry and other partners will be invited to be at the forefront of efforts to ensure that what is done is consumer-relevant, joins up different partners and has measurable impact.



Castle Ashby



Barnwell Country Park



Northampton Museum & Art Gallery

Dynamic & Tailored Marketing.

Encouraging our loyal and local market, as well as reaching out and attracting new visitors needs a collective and cohesive effort with everyone pulling in the same direction. Both groups of visitors offer opportunity. We know that Northamptonshire's visitor economy is marked by a more local catchment than many other destinations which has a number of advantages:

- The number of repeat visitors is higher with customer loyalty likely to be easier to win and maintain.
- Visits are more likely to be more spontaneous, can be more easily stimulated by local offers and are less affected by issues like bad weather and traffic congestion.
- They support local services and small businesses, have a lower carbon impact and give an opportunity for health and other benefits for our residents.
- Local visitors are more likely to support and invest into the local and circular economy.

While local visitors are important there is also an acknowledged longer-term need to draw in new spending by building greater awareness of the county and attracting leisure and business visitors from further afield. These visitors can be encouraged to stay for short-breaks and longer stays by a combination of concerted marketing activities, better packaging of complementary assets, greater levels of cross-selling and longer-term investment.

Blue and Green Infrastructure Opportunities.

The 91-mile River Nene, threading its way through Northamptonshire's Nene Valley, is one of the longest rivers in the UK and offers a superb opportunity to attract many different types of visitor to enjoy a quintessentially and internationally important English landscape shaped over millennia. A mix of history, cultural heritage, natural habitats, trails, boating and numerous other activities await the visitor. The river can be further linked to bring in other marine experiences such as the Grand Union canal network and the museum at Stoke Bruerne. The county has numerous country parks of which eight are nature reserves or wetlands of importance. These assets will be better connected and promoted while small businesses developing new products will also be supported.

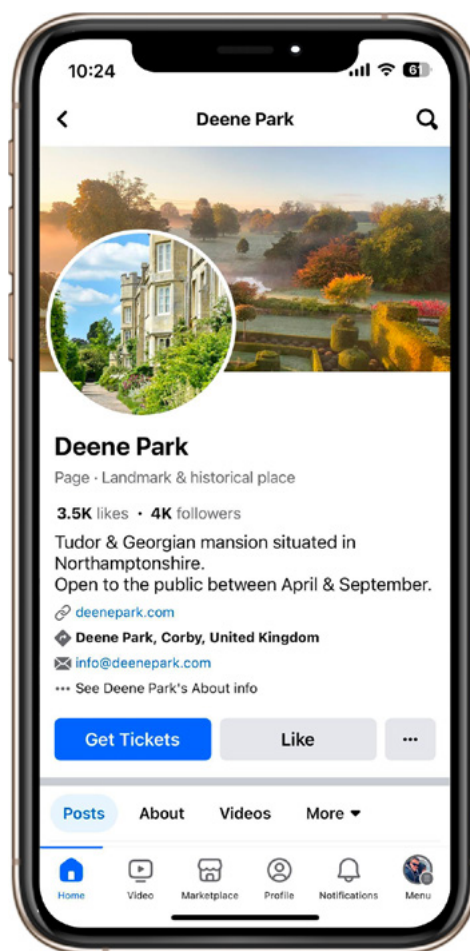


Northamptonshire County Cricket Club

How we reach these audiences who live further away and encourage them to come to the county is a key challenge and one which is not about the size of marketing budgets, but about the delivery of a more sophisticated mix of awareness raising, PR, social media and other activity. The need for an innovative approach to putting Northamptonshire on the map supports the engagement of a creative agency to help deliver an integrated campaign, overseen by the Northamptonshire Marketing Group. This will include working closely with VisitBritain on the US and European markets.

A range of branding and promotional approaches have been used in the county over the years targeted at both consumers and businesses and aimed at attracting all sorts of visitors to stay, work, visit and experience the county. These campaigns have often lacked investment when compared with better resourced destinations and their ability to reach consumers has been largely limited to websites and PR activity. More major campaigns drawing on the county's local food and drink, its history, culture, natural heritage and outdoors will provide a strong basis to interest markets from further afield.

It is however universally agreed amongst all stakeholders involved that the most important factor in making this happen is better collaborative working: across sectors, products and places and to connect these opportunities together, package them and promote them collectively. The new Board will have oversight of this mission. We have not tried to second-guess how the branding and marketing plan might look in this document – so for example, have not identified target customers as the foundations need to be put in place first.



Case Study: Wildfoods Festival, Hokitika, New Zealand.

Wildfoods Festival is an annual food festival in Hokitika, New Zealand, held in March. This creative food festival is known for a vast collection of unusual foods, including huhu grubs, lamb's testicles and more. Not for the faint of heart, this unique food and drink festival is for the adventurous, although some stalls provide more normal types of food. Even if you don't come for the strange food, there are plenty of other activities to enjoy, including a Feral Fashion competition, a firework display and plenty of local musical entertainment.

Planning for the Future.

Regeneration schemes now underway in many Northamptonshire towns will undoubtedly help attract visitors. Examples include:



The Market Square project in Northampton which includes a new large event space with a planned annual events programme, which is part of the Towns Fund and Future High Street Fund £33 million investment.



The Watermeadows project in Towcester which will enhance the visitor experience of this much-loved natural area.



The Corby Towns Fund which is investing £20m in improvements to include an arts and community centre.

Active travel and Greenway projects will also support local visitors to find their way around more easily, such as the *Smart Move Northamptonshire* scheme. Planning policy clearly supports the sector with, for example, the North Northamptonshire Joint Core Strategy Vision stating its strong focus on growing investment in tourism, leisure and green infrastructure and the West Northamptonshire Joint Core Strategy stating that tourism, visitor and cultural industries form an important part of the economy for both urban and rural areas. The night-time economy can also be further developed in our towns offering other opportunities for businesses, visitors and residents.

While planning policy is supportive of the visitor economy, it has not always been possible for it to proactively set out a new vision for the type of facilities that will put the county on the map. This is unsurprising as land-use planning in Northamptonshire has historically been undertaken at a more local level. However, the two new Unitary authorities have a commitment to a county-wide approach to the visitor economy, and offer an unrivalled opportunity to think differently. Future investments relating to the Visitor Economy will be looked on favourably where they meet planning policy requirements and aid the delivery of this strategy.



Hothorpe Hall courtesy of Ferri Photography



Holy Cross Church, Daventry



Oundle Food Festival

The Strategy will support the continued development of a network of traffic-free routes and trails reflecting broader net zero ambitions and meeting visitors' increasing demands for lower carbon leisure breaks. Given our strong local market, these facilities will also give residents new leisure options closer to home to enjoy, relax and feel at one with nature. Numerous benefits relating to health, wellbeing, net zero and bio-diversity will accrue for both our residents and visitors as well as the wider environment. Further development of the countryside and the network of walks and trails will underpin a strengthened sustainable rural tourism offer and also support previous investments by adding to existing clusters. There are opportunities to encourage new visitors with alternative forms of accommodation such as glamping and camping, and these types of facilities will be encouraged, particularly near trails and local natural assets.

The visitor attractions sector is a diverse and buoyant part of the county's asset base, much of which is built on a rich seam of natural and built heritage which is way ahead of most of England in terms of its historical significance. Well over 100 churches alone offers rich pickings for niche markets in architecture and ancestry. Equally important is much of the landscape and wildlife, recognised in areas such as the Nene Valley Special Protection Area.

Case Study: Tarraco Viva – Tarragona.

Spreading ancient history in an attractive way that provokes reflection about our past. That was the aim when Tarraco Viva was set up in 1999. "History for everyone" could be the motto for this international festival dedicated to spreading the history of Roman times. Tarraco Viva has become a benchmark event thanks to both the proposals that it makes and the quality that it offers. Military life and daily life; the legions, the theatre, the gladiators, the homes, the cuisine, the writings, the engineering, the fashion... all recreated with a common denominator: exactness. Getting to know the past is not something that is confined, rather it is the best way to understand the present and, therefore, to be able to choose the future. You will probably discover that you are more Roman than you thought! Welcome to Tarraco...



Northampton Filmhouse



White Mills Marina



Irthlingborough



Nene Wetlands

In general, however, the consumer remains largely unaware of many of these assets or their place in history. There is an opportunity to further develop, package and present this authentic offer in a more compelling way, attracting both new and repeat visitors. A range of product development is also needed including new accommodation that is rooted in the place, making better connections between places and cross-promoting assets in a way that increases their appeal and makes it easy for the visitor to purchase. Other destinations, such as Ireland, have adopted a structured process to developing their small businesses and we will support such a Visitor Experience Development Planning process to engage businesses connected to both Blue and Green infrastructure to maximise their potential. Additionally, relatively simple actions will also be reviewed, with visitor attractions invited to agree a set of core opening hours for example, which will increase visitor numbers and extend the effective operating season.

Case Study: The Wild Atlantic Way.

Visitor Experience Development Planning has helped businesses on the west coast of Ireland make strong connections to the natural and cultural heritage around them and be part of telling a compelling story of the area. This work has helped deliver a consistent message that inspires visitors to recommend and return. This is more than providing a great individual tourism experience – it is about businesses understanding and playing their part in incorporating the unique natural and cultural signature of the place and then telling that story with passion.

To grow the visitor economy over the longer term, Northamptonshire would benefit from new investments that create additional reasons to visit, particularly to attract people living further away. These opportunities may be leisure or business focussed, rural or urban based, linked to existing regeneration schemes or completely new. The evidence base that informed this strategy revealed some product shortcomings, including a lack of higher-end hotels and a scarcity of contemporary conferencing and exhibition space.

A Futures Review, overseen by the LVEP, will answer the question *What sort of attractors can now help put Northamptonshire at the centre of the tourism map?* Building on the evidence base produced to inform this strategy, the Review will:

- 01 Involve the industry, stakeholders and residents in a discussion about new and creative opportunities, rooted in Northamptonshire's heritage and history, that embody the county as a whole.
- 02 Examine new and emerging international leisure and business tourism concepts that can provide the county with a palette of development opportunities to consider.
- 03 Examine the fit between these concepts and the wide range of development sites already identified in regeneration plans across the county.
- 04 Review ways in which larger scale visitor economy projects can be better connected into the councils' other strategic and development priorities.

Case Study: Silverstone.

Some strategic sites have already seen significant and recent investment, for example, the interactive museum Silverstone Circuit, a recent 197-room hotel operated by Hilton and *The Wing* conferencing space with five exhibition halls and 12,500 m² of meetings and events space. This will drive further growth and help the wider economy of the sub-region.



Aerial View of Silverstone Circuit

Improving Quality & Skills.



There is an acknowledged need to improve the quality of elements of the offer and also a pressing challenge to encourage more people to take up a career in hospitality, tourism and events. Currently these issues are linked and this objective seeks to address them via a range of actions, the majority of which will be as a result of a strategic partnership with the county's educational institutions, business support organisations, Local Skills Improvement Plans (LSIP) and other providers.

When measured by online reviews, the quality of serviced accommodation is lower than other parts of England. This partly reflects the age of some of the stock and will be addressed by a mix of investment, business support and training. Town centre regeneration schemes have already meant the withdrawal of some older accommodation stock that may have previously dragged down quality. Many new innovative business concepts are emerging in the county and continue to help lift quality standards and diversify the offer.

We highlight the need for collective action to address the recruitment crisis in the industry which is reducing business capacity, productivity and profitability. Working with colleges, universities, and other bodies, we will work to develop a talent pipeline of motivated and skilled employees to provide increased numbers into the industry. Working together, we need to design a new way to fill roles such as chefs, food service teams, kitchen staff and front of house. The exact activity and partnership arrangements will be developed after more discussions with the educational sector and agencies involved. We see this task as one that crosses counties and so may result in a multi-partner / agency work programme.

The new Local Skills Improvement Plan presents an opportunity to prioritise the visitor economy, as there is currently a limited focus on the talent pipeline within education, little employer engagement in schools and the potential to extend the central careers hub offer to help deliver the strategic approach needed. A key goal of this strategy is to address this issue – with indicative actions are set out in the Draft Action Plan on page 42.

The county's strengths in travel and tourism education, particularly the University of Northampton's portfolio of relevant courses at under-graduate and graduate level, can also be levered for mutual benefit with students, lecturers and professors all able to contribute positively to the delivery of this strategy. A strong connection will be made between academics and practitioners via specific projects set out in the Draft Action Plan.

Producing Tomorrow's Travel and Tourism Leaders.

Northamptonshire is well placed to support the visitor economy with 25 further and higher education courses offered by 14 colleges and universities. These range all the way from Level 1 vocational training courses in Hospitality, through level 3 diplomas in food and beverage apprenticeships to degree and post-graduate courses in Events Management, International Tourism and Hotel Management. This gives a great basis to encourage a home-grown workforce that can help professionalise the sector and act as long-term ambassadors for the county.

In addition to workforce development, support will also be offered to our many small businesses to help them address other key issues that align to this strategy:



Access and Inclusion – via an option of having an access audit and help with the production of an Accessibility Guide.



Digital Advance – to ensure that businesses are keeping up with and effectively using the latest business management technology.



Net-Zero Action – to ensure that businesses can drive down energy costs, reduce carbon, reflect visitor requirements and help develop local supply chains.



Work Readiness – to ensure that people entering the workforce have the practical and knowledge skills to make a great impression, solve problems, communicate effectively and be customer focussed.

Access for All.

A priority cross-cutting theme is being better at welcoming all types of visitors who may have differing needs, whether that's a parent with a pushchair, a wheelchair user, an older person or a visitor with dementia. Northamptonshire will aim to become a UK inclusion exemplar, encouraging all businesses that welcome visitors to create their own accessibility guide, both because it's the right thing to do and because of the scale of the opportunity. With a market that is 19% of the total population, with total spending power of over £15bn a year, and who stay longer than average, this is one key to unlock new visitors to the county.



This strategy sets out a blueprint for Northamptonshire to boost the economic value of the visitor economy with a focus on four core themes – attracting more visits and value; developing our people and workforce; supporting local businesses; and providing the impetus to attract new investment that inspires new places and spaces. This is a countywide approach designed to start us on a positive journey to managed growth, supported by both unitary authorities working closely together, and seeking a strong and collaborative approach with the industry, key stakeholders and other public sector partners. The new Local Visitor Economy Partnership, chaired and led by the industry, will be the way in which this strategy is delivered, taking account of a broader development agenda, encompassing innovation and best practice to make Northamptonshire stand out – not just as a great place to visit but also as a place to work, to run a business and to invest.

What Does Success Look Like?

This Strategy runs from 2023 to 2030 with the delivery of much of it to be coordinated by a Local Visitor Economy Partnership for Northamptonshire. The targets outlined relate to the main strategic goals and will be endorsed by the LVEP Board, after its review of the early priorities and funding opportunities.

This Strategy will drive significant benefits for the county and is foreseen to create over 2,000 additional jobs and over 200 new start-up businesses directly supporting places, residents and communities. More staying visitor spending will mean greater economic impact flowing through local supply chains. Implementation will see Northamptonshire rise up the tourism league table with a foreseen 7% growth in visitor nights resulting in a place in England's top 20 tourism counties.



Delapré Abbey

Our Strategic Targets.



Increased Visits & Value.

- **Boost Value** – Increase the value of staying leisure visitors by 8% in real terms over the period of the strategy (measured by visitor spending).
- **Increase Turnover** – Increase overall visitor spending from £972m to £1.1 billion in nominal terms over the seven year period (+13%).
- **Correct Perceptions** – Repeat the consumer survey every 3 years to track the proportion of people who *Don't know what there is to see and do in Northamptonshire*, reducing the current 2022 baseline of 35%.



Inspired & Skilled Workforce.

- **Create Jobs** – Facilitate the creation of 2,100 additional jobs in the visitor economy over the seven year period of the Strategy (+7%).
- **Offer Opportunity** – Provide a pathway to encourage both younger people and older workers to benefit from jobs in the visitor economy (numerical target to be confirmed).
- **Improve Quality** – Establish a strategic partnership to drive up standards of accommodation by bringing 75% of the County's accommodation stock into the two top quartiles (current baseline 60%).



Business Growth & Collaboration.

- **Stimulate Local Enterprise** – Support the development of 210 new businesses rooted within the County's visitor economy (+7%).
- **Act on Net Zero** – Encourage 25% of the County's professional accommodation sector to sign up to a recognised sustainability standard or undertake related activity (140 Businesses).
- **Provide a Welcome for All** – Encourage 50% of the County's visitor attraction to sign up to a recognised accessibility scheme or undertake related activity (92 businesses).



Inspirational Places.

- **Increase the Amount of Investment and Maximise its impact** – Provide visitor economy expertise to 5 regeneration partnerships to help attract visitors to these revitalised destinations.
- **Generate Community Value** – Improve residents' perceptions of the value of tourism by increasing the proportion who *Strongly agree that visitors bring benefits to the community* by 15% (Baseline 40%).
- **Inspire New Offers** – Working with 30 businesses, attract more short break leisure visitors by developing and packaging two new offers focussed on the County's Blue and Green infrastructure.

Monitoring.

The Strategy will be monitored quarterly and reviewed annually by the LVEP, working closely with other partners, the industry and the Councils. Leads will be identified to champion the core priorities, focussing on collaboration, dynamic and tailored marketing and workforce and skills. Roles and responsibilities will be identified and the Draft Action Plan modified as a result of more detailed work and agreement by the LVEP Board.

Appendices.

Northamptonshire's Strengths and Weaknesses.

Strengths.

- A rich network of natural assets, attractive landscapes and picturesque villages, with a high quality tourism product.
- A rich and varied set of visitor attractions across the county.
- A peerless cultural heritage including numerous historic locations and assets, churches, stately homes, museums and other architecture of note.
- New investment in visitor welcome to engage the local market and motivate additional trips.
- Recent related investment, such as Rushden Lakes, driving new footfall, combining with a regenerated 'high street' offer and commercial partnerships with room for growth.
- A comprehensive food & drink offer including many new restaurants and pubs giving a robust base on which to further develop.
- A rich artists and makers community, growing through creativity and entrepreneurship.
- Sporting success with cricket, rugby, football and motorsport all at elite level.
- World-renowned experience and destination of Silverstone Park, offering a global identifier for Northamptonshire as a location.
- An established set of outdoor activities and experiences based around walking, cycling, natural trails, waterways and country parks.
- A willingness of local stakeholders for collaborative working across visitor attractions and other elements of the visitor economy.
- An unmatched visitor catchment, central location and a good transport network – fast and easy access with 4.8 million living within an hour and a further 24 million within 2 hours.
- Recent consumer trends support increased interest in Northamptonshire and its range of tourism assets.

- A legacy of best quality footwear with headquarters of current icons such as Doc Martens.
- Universities and college network offering numerous travel and tourism courses.

Weaknesses.

- A legacy of the past management of the wider county and consequently little recent track record in an aligned approach to the visitor economy in terms of its direction, involvement or governance.
- Low general national visibility, a county that is not widely recognised, with limited consumer knowledge of the county's offer.
- Yet to be associated with famous and major 'household name' visitor attractions.
- Limited accommodation and customer facilities to attract overnight stays / lack of alternative / active accommodation to suit a lucrative staycation market.
- Some issues relating to customer service levels, particularly in parts of the accommodation sector.
- Lack of central government investment, unclear funding sources, with a risk of change in central government policy affecting the delivery of this new strategy.
- Little connectivity between tourism and hospitality, businesses viewed as competitors rather than collaborators.
- Poor connectivity across the county, lack of public transport to smaller attractions, access that relies on driving.
- Locals don't feel pride to promote the county / a confused identity (public/ media perception).
- Little engagement / packaging for travelling fans with e.g. Cobblers games.
- Residents / local people not that engaged.
- Lack of focus on regenerative tourism.
- Impact of staff shortages and skills development needs / a lack of service quality.

Opportunities and Threats Facing Northamptonshire.

Opportunities.

- To develop a new brand for Northamptonshire tourism that everyone can support, endorse and champion for mutual benefit.
- To build an offer suitable for longer stay national and international markets in the mid to long term (5 – 10 years).
- To develop robust and relevant datasets that generate compelling insight for tactical decision making and to quantify success over the longer term.
- To capitalise on the natural offer and rural strengths in the county, developing and packaging further experiences to capitalise on health and wellbeing trends.
- To modernise the accommodation offer – broadening it to include glamping options and reflecting other contemporary trends for e.g. mixed spaces for co-working and community space.
- To develop sustainable travel options – for example hop-on-hop-off electric buses and boats and embed sustainable and accessible practices across the visitor economy.
- To develop cross-marketing opportunities for increasing dwell time, length of stay, spend power and repeat trips.
- To create impactful promotional campaigns with video material, media coverage and PR to drive opportunities.
- To collaborate with local colleges and the University of Northampton to support apprenticeship programmes and courses to build a skilled employment base.
- To create win-win public/private partnerships (e.g., Council assets for private investment).
- To create a range of itineraries tailored to a variety of audiences and designed to extend the length of stay.

Threats.

- Multiple local destinations may reduce the opportunity of a shared buy-in to a single county-wide umbrella brand and related messaging.
- Long standing and invested stakeholders may find it harder to agree to a collective vision and a more strategic approach.
- Actioning the delivery of the strategy is reliant on having the requisite resources and capabilities.
- There is a need to review current planning policies in order to unlock growth of certain sectors, such as accommodation and conferencing product.
- There is a need for the transport strategy to better reflect the visitor and support public transport movements across/around the county.
- There is a need for an investment plan to scope and enable inward investment to support longer term growth.
- There is a national challenge regarding finding, upskilling motivating and retaining hospitality staff. This is made far more acute in the county because of other competing growth sectors such as logistics.
- Wider economic growth may reduce or affect areas of high landscape value important for tourism.

Draft Action Plan.

Goal 1 – Increase the number of staying visitors from outside the county and encourage day visits from closer to home.

The draft action plan will be led on initially by the two local authorities in partnership with stakeholders, partners and the private sector to achieve short-term goals. The LVEP, once established, will then take a lead on delivering future activities regarding Tourism for Northamptonshire in partnership with public and private stakeholders and partners.

Key actions	Implementation of key actions	Timescale	Lead organisation	Resources needed
1.1 Prepare the ground for revitalising marketing and promotional arrangements.	Identify and engage all core public and private sector partners who have a part to play in growing the visitor economy. Agree working relationships that prioritise collaboration and action.	Short	NLVEP & Partners	Low
	Assess the product offer and priority source markets and develop a <i>Marketing Opportunities Framework</i> that identifies priorities and delivery arrangements.	Short	NLVEP & Partners	Low
	Agree a county-wide protocol for marketing activity to include partner roles, collaborative arrangements, brand guidelines, promotional norms and funding opportunities.	Short	NLVEP & Partners	Low
	Establish new marketing partnerships to include a Visitor Attractions Network aimed at incentivising the more local market to make multiple trips. e.g. multi-site discounted promotions etc.	Short	NLVEP & Partners	Low
1.2 Build collective knowledge about longer distance staying visitors.	Draw insight from the Market Review and other sources to identify trip purpose, key geographic target areas and the core offers that will underpin promotions.	Medium	NLVEP & Partners	Low
	Develop travel trade activity for both domestics and overseas markets centred on in-county partners and VisitBritain particularly US and Spain – capitalising on the <i>History, Houses & Heritage</i> theme.	Medium	NLVEP & Partners (incl. VB)	Medium
1.3 Re-present, reposition and raise awareness of Northamptonshire and its offer.	Appoint a full-service creative agency to develop a new narrative that supports the county brand, partners' brands / destinations and related content. Run an industry-focussed 3 year campaign connecting also to other inward investment and business promotion requirements.	Medium	NLVEP & Partners - Northamptonshire Marketing Group	High
1.4 Capitalise on the business tourism market.	Subject to the results of point 5 above, develop a <i>Meet in the Middle</i> campaign to encourage business visitors to the county.	Medium	Northamptonshire Marketing Group	Medium

Key actions	Implementation of key actions	Timescale	Lead organisation	Resources needed
1.5 Raise visitor awareness of new product, trails, facilities and accommodation.	Natural Offer & The Blue Way – Audit the current product, its distribution and connections. Work with partners and accommodation providers to package discrete sections that can offer a high quality short-break experience for visitors.	Short	Destination Nene Valley	Medium
	Trails – Audit the current product, its distribution and connections. Work with partners and accommodation providers to package sections that can offer soft-walking short-break experience for visitors.	Short	Councils	Medium
	Identify operators, sites and support businesses to accelerate the development of new glamping, camping and self-catering accommodation concepts.	Medium	NLVEP & Partners	Medium
1.6 Invest in Facilities & Services focussed on the Blue Way, trails and footpaths.	Assess existing investment plans for the Blue Way, footpaths and trails, survey visitor requirements accessibility and amend / add to current product mix.	Short	Councils	Medium
	Prioritise investment in those areas that will attract visitor use and support business development under Goal 3.	Medium	Councils	High
1.7 Unlock opportunities to boost local visitors.	Draw on the Bus Service Improvement Plans and other transport surveys to understand current visitor usage, identify modal split for visits to main attractions and identify constraints to visitor use.	Short	Specialist	Low
	Work with the visitor attractions network to incentivise public transport usage by local visitors.	Medium	Visitor Attractions Network	Medium
	Regularly audit the county's festivals & events to provide a complete picture of opportunities with a view to making strategic investments in those with potential.	Short	NLVEP	Low
	Provide support to the local authority service areas and/or partners, responsible for identifying new opportunities to design/establish/attract and acquire new festivals and events to the county, with a view to making strategic investments that help to fulfil these opportunities.	Short	NLVEP	Low

Key**Timescale:**

Short: <1yr

Medium: 1-3yrs

Long: >3 yrs

Resources needed:

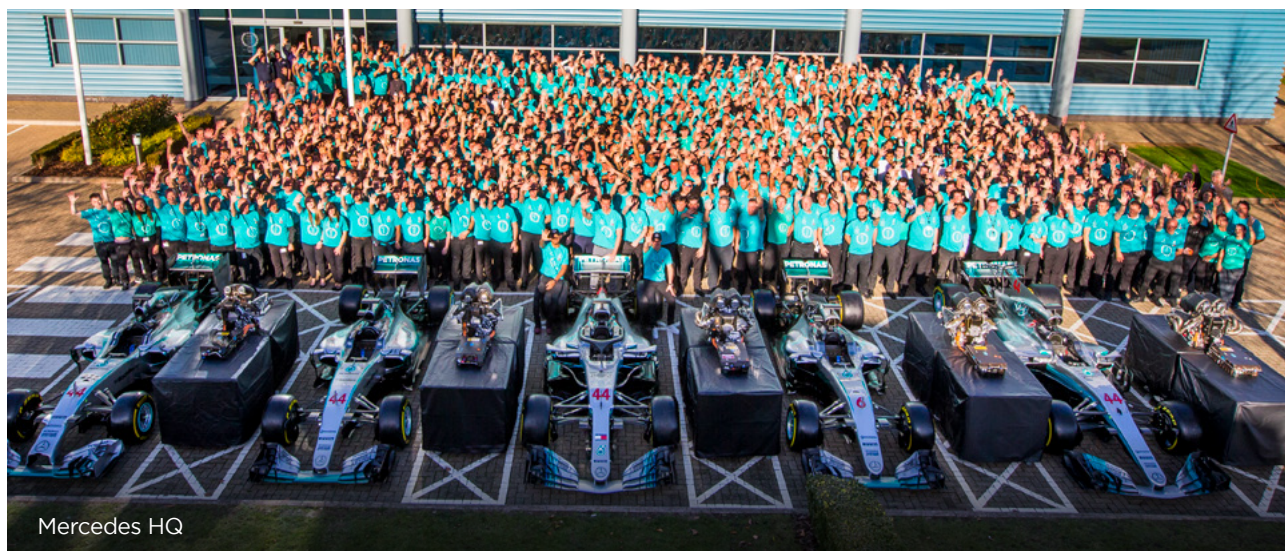
Low: Cost considered to be up to £25k

Medium: Cost considered to be £25k – £100k

High: Cost anything above £100k

Goal 2 – Develop local talent into a motivated workforce to fill vacancies, boost standards and increase pride in the place.

Key actions	Implementation of key actions	Timescale	Lead organisation	Resources needed
2.1 Build the capacity and foundations to be able to respond to the workforce challenge.	Agree Terms of Reference and scope for a 'Workforce Taskforce' with key strategic partners – universities, chambers, industry and potentially neighbouring authorities and focus on targeting populations affected by inequalities.	Short	NLVEP & Partners, Educational & Industry Bodies	Low
	Build a mutually supportive wider network of all interested partners who can benefit from this initiative and survey to identify requirements.	Short	NLVEP & Partners	Low
	Audit the funding options and bid for funding to run the network.	Short	NLVEP & Councils	Low
2.2 Encourage new talent towards the visitor economy.	Develop materials and engage with careers services in schools and further education, and a targeted approach in areas of high economic inactivity to boost the appeal and raise the opportunity of a career in the hospitality sector.	Medium	NLVEP & Partners	Medium
	Hold an Annual Northamptonshire Visitor Economy Jobs Fair ensuring reach to areas and populations experiencing high levels of unemployment and barriers to employment.	Medium	NLVEP & Partners & Specialist	Low
2.3 Encourage education and industry to do even more.	Encourage all education partners to adopt, for example, Hospitality Accreditation from People 1st.	Medium	NLVEP & Partners	Low
	Support businesses into customer service training programmes dealing with the cross-cutting themes set out in this strategy.	Short	NLVEP & Partners & Specialist	Medium



Goal 3 – Support our visitor economy businesses to collaborate locally and compete nationally.

Key actions	Implementation of key actions	Timescale	Lead organisation	Resources needed
3.1 Improve comparative insight available to visitor economy businesses.	Assess interest and potential of establishing an online How's Business? survey that tracks the performance of all sectors of the county's visitor economy and allows peers to benchmark their performance against their sector and the wider industry.	Short	NLVEP & Partners, & Industry	Low
3.2 Increase the quality of the offer in terms of sustainability, accessibility and visitor experience.	Develop / buy in a Green Action Toolkit and related support to help businesses reduce their carbon footprint, reduce costs and offer a service aligned to today's visitor.	Short	NLVEP & Partners	Medium
	Develop a Purple Action Plan and related support to help businesses improve the accessibility of facilities and offer an inclusive welcome.	Short	Specialist	Medium
	Evaluate all actions in this Plan through Accessibility and Sustainability lenses and incorporate relevant actions in each key action as necessary.	Medium	NLVEP & Partners	Medium
	Develop a Visitor Experience Development Plan, which can provide the next step in helping businesses to embrace the uniqueness of the area and tell its compelling story.	Medium	NLVEP & Partners & Specialist	Low
3.3 Increase the productivity of visitor economy businesses.	Establish a dedicated Visitor Attractions Network to connect up, share best practice and inform other strands of this Draft Action Plan.	Short	NLVEP & Partners	Low
	Source a training company to offer training on all aspects of business digitalisation including DMS, booking engines, TXGB etc.	Short	NLVEP & Partners & Specialist	Low
	Support all employees, through their employers, trainers and partners, to be the best versions of themselves, valued, developed and rewarded across all sectors of the Northamptonshire visitor economy.	Long	NLVEP & Partners	Low

Key

Timescale:

Short: <1yr

Medium: 1–3yrs

Long: >3 yrs

Resources needed:

Low: Cost considered to be up to £25k

Medium: Cost considered to be £25k – £100k

High: Cost anything above £100k

Goal 4 – Identify and attract investors to help inspire the further development of our unique, diverse and contemporary offer.

Key actions	Implementation of key actions	Timescale	Lead organisation	Resources needed
4.1 Establish robust long-term governance for the visitor economy.	Establish a new Board and Chair – with clear terms of reference and responsibilities including diverse representation across the visitor economy. Further to that, establish new working groups to agree and progress the actions in the Strategy.	Short	Councils	Low
	Complete the application for the Board to formally become the Local Visitor Economy Partnership for Northamptonshire.	Short	Councils	Low
	Hold a Visitor Economy Conference to involve, inspire and report to a wide range of partners and to inform the next annual work programme.	Annually	NLVEP & Partners	Low
4.2 Increase the understanding of the potential of the visitor economy.	Undertake a Futures Review to enable a long term and agreed Visitor Economy Investment Framework with a view to engaging property interests, investors and central government. With a focus on major visitor attraction feasibility and all types of accommodation, sites and financial incentives.	Short	Councils	Medium
	Develop a Datahub to draw relevant insight together and better understand sectors and the wider economy's performance.	Medium	NLVEP & Partners	Medium
4.3 Optimise the potential of the visitor economy.	Join the dots across the policy landscape in favour of the visitor economy focussing particularly on connectivity (transport and digital), skills and training, and planning policy. Report annual progress to the Councils and visitor economy partners.	Long	Councils	Low





Northampton Bike Park



Fotheringhay



Braunston Canal



Canons Ashby



Kettering Park Hotel



The Core at Corby Cube



Kettering



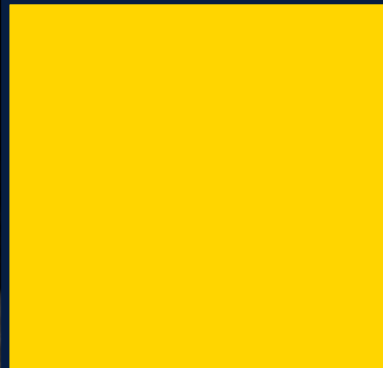
Northampton and Lamport Railway



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