

28 July 2021

Agenda Item: 7

REPORT OF THE CORPORATE DIRECTOR, PLACE**NOTTINGHAMSHIRE VISITOR ECONOMY STRATEGY UPDATE****Purpose of the Report**

1. The purpose of this report is to:
 - a) Provide an update on the issues impacting on Nottinghamshire's Visitor Economy and delivery of the Council's Visitor Economy Strategy; and
 - b) To seek guidance from Members on the future ambition and role of the Council in the County's visitor economy

Information

2. The Visitor Economy is one of the UK's largest and fastest growing industries and is a driver for growth in our local economy. Nationally, it generates £106 billion (GDP) a year. It employs over 2 million people and supports thousands of businesses. Highlighted as a key sector by D2N2, the Visitor Economy works hand in hand with a wide range of sectors across England, including farming, food, transport, retail, sport, planning, accommodation, green spaces, nature, museums and the arts.
3. The Council's first Visitor Economy Strategy was adopted at 13 February 2019 Policy Committee and launched at a Visitor Economy Summit in June 2019. The Strategy sets out an ambition for the activities underpinning it to deliver an additional 5 million visitors, support 2,900 additional Full-Time Equivalent (FTE) jobs, deliver £240m of additional economic impact and create an additional £80m Gross Value Added (GVA).
4. Despite the impact of the pandemic however there have been a number of successes in respect of the Visitor Economy Strategy including:
 - "A Pilgrim Adventure" augmented reality activity book produced that allows children to discover the story of how William Brewster, a boy from Nottinghamshire, helped to change the world. Digital version available for download at: <https://www.nottinghamshire.gov.uk/media/2885813/apilgrimadventure.pdf>
 - Continued development of the visitor offer at the three Council owned visitor economy hubs in partnership with their operators: Holme Pierrepont; Sherwood and Rufford. Significantly increased footfall and demand during the COVID-19 pandemic across Council owned green spaces
 - Work with partners to develop tourism cycling opportunities - An expression of interest has been submitted to D2N2 LEP for funding to restore Calverton former mineral line and

provide a safe, off-road bridleway/cycleway from Bestwood to Calverton, linking through to Sherwood Forest and attractions such as Papplewick Pumping Station. A feasibility study to be produced in partnership with VIA.

- Miner2Major – work underway to offer heritage skills training for Inspire 16-19 construction students. An online training programme is now being delivered, following a stakeholder needs survey of heritage tourism partners
 - 5G Connected Forest project – exploratory meetings continue around testing semi-autonomous vehicles to transport visitors, particularly those with mobility issues to Sherwood Forest. Augmented reality (AR) projects underway at Rufford and Sherwood.
 - Launch of the Food and Drink Business Support Toolkit: <https://www.nottinghamshire.gov.uk/business-community/business-support-and-advice/food-and-drink-toolkit>
 - The Council is a partner in the Growth Hub and has offered support to a range of businesses, including those from the visitor economy sector. This has included support through the various COVID-19 support schemes and specifically, the Recovery Grant geared towards the visitor economy sector. The Council's Business Advisers promoted widely to the sector across the County and supported applicants with queries. The Growth Hub has also initiated mentoring opportunities and specialist webinar sessions to support growth within the sector and to deal with challenges of re-opening safely.
5. The visitor economy is one of the six themes of the Council's COVID-19 crisis Economy Recovery Action Plan, which was launched in September 2020. An update was provided on the recovery action plan at the 16 June 2021 Economic Development & Asset Management Committee.
 6. However the strategy has not been fully realised. One of the main reasons being the COVID-19 pandemic which has had a devastating impact on the visitor economy. Tourism was one of the worst hit sectors, and although the "UK Staycation" presents a massive opportunity, it does not negate the effect of inbound visits being down 80% and overall spend down by 62%. Visit Britain's current 2021 forecast is for a recovery to £51.4bn in domestic tourism spending in Britain in 2021. This is up 51% compared to 2020 but still only 56% of the level of spending seen in 2019.
 7. A COVID-19 Visitor Economy Recovery Planning Business Survey completed in June 2020 reported that 70% of the surveyed businesses in Nottingham and Nottinghamshire had lost more than 80% of trade due to COVID-19 restrictions.
 8. The County Council therefore needs to refresh the Visitor Economy Strategy to reflect the challenges of the pandemic and respond to the latest business intelligence. COVID-19 has resulted in a 'new normal' that the NCC Visitor Economy Strategy now needs to reflect and respond to the changing needs of the Council and the tourism sector. It is important that Members continue to monitor the situation, identify priorities and adapt so that Nottinghamshire thrives in the future. It is also important that our colleagues in the District Councils and other key partners and stakeholders are included in our plans for moving forward.
 9. The Visitor Economy creates a unique opportunity to showcase the best of Nottinghamshire to external audiences in a way other sectors cannot; ways which help position the County as a great place to live, work and study as well as to visit. The County Council needs a clear vision for its own role within the Nottinghamshire Visitor Economy. It needs to communicate that

direction to stakeholders and beneficiaries and demonstrate, step by step, how it will support the tourism sector across the county, especially after the difficulties of the past year.

10. The Council recognises that getting the economy back on its feet will not be achieved by one partner alone or by one strand of investment or actions. The economy is most successful when different organisations, partners and stakeholders work together for the benefit of the people who live, learn, work and visit in Nottinghamshire.

11. The following opportunities have been identified in relation to the Council's role within Nottinghamshire's visitor economy:

- The Government commissioned Independent Review of Destination Management Organisations (DMOs). The written report and recommendations are due to be submitted to the Secretary of State in Summer 2021. The Government recognised that a review was required to assess how DMOs across England are funded and structured, and how they perform their roles, in order to establish whether there may be a more efficient and effective model for supporting English tourism at the regional level, and if so what that model may be. This may provide future opportunities for the Council to take a leading role.
- The green spaces under the Council's control provided a lifeline for people during the pandemic and saw increased footfall. There is an opportunity to build on this to support increased visitor numbers and spend at the visitor economy hubs.
- Refreshing our visitor economy strategy would provide an opportunity to renew links with stakeholders including local businesses, district councils and wider organisations with an interest including (but not exclusively); heritage organisations and local transport bodies. This could lead to increased partnership working, the chance to pool resources on visitor economy and ensure a collaborative approach was taken to engaging with the visitor economy sector. It would also provide a chance to re-engage officers and members across the Council on the importance of the visitor economy. For a truly effective strategy, it is essential that the impact on the visitor economy is considered in decision making across a wide range of Council services.
- A refresh would enable the strategy to be revised to maximise the opportunity of the increased interest in domestic tourism, providing a real chance to establish and promote the Nottinghamshire brand and offer.

12. To aid the recovery of both domestic and international tourism, the Council now needs to take the opportunity to decide on the role it is going to play within the Visitor Economy in Nottinghamshire. Following a review of options it is recommended that the Council acts as a strategic co-ordinator of the visitor economy strategy that includes the Council as a facilitator of projects that supports, yet stands behind the sector, using internal and external funding (where available), and through its partnership working to create a sustainable infrastructure for the tourism sector to flourish. This could also include commissioning of local businesses and partnership working as referenced under opportunities above and would see the Council work directly with local partners and organisations.

Other Options Considered

13. The “Do Nothing” option would see the Council adopt a passive role in the County’s visitor economy and move away from delivery of a visitor economy strategy. The Council could complete the minimum required commitments but determine not to provide further funding or staff resource. It is felt that the “do nothing” option should be discounted due to the importance of the visitor economy sector to the Nottinghamshire economy. The Strategy directly contributes to the County Council Plan (2017-2021) commitment of Nottinghamshire being a great place to live, work, visit and relax. Whilst it is recognised that the other options proposed will require investment, the “do nothing” option and only committing to minimal spend is unlikely to be an effective use of resource and will not return any significant benefit to the Council or to delivery of its strategic objectives.

Reasons for Recommendations

14. To seek the Committee’s agreement to work to refresh the existing visitor economy strategy. The recommendation recognises that Members will need to consider further information following the refresh including any financial and other implications before finalising the strategy. The recommendation also recognises the need for the Council to work collaboratively with local authorities, businesses and other stakeholders to address the challenges the visitor economy sector faces.

Statutory and Policy Implications

15. This report has been compiled after consideration of implications in respect of crime and disorder, data protection and information governance, finance, human resources, human rights, the NHS Constitution (public health services), the public sector equality duty, safeguarding of children and adults at risk, service users, smarter working, sustainability and the environment and where such implications are material they are described below. Appropriate consultation has been undertaken and advice sought on these issues as required.

Financial Implications

16. There are no financial implications arising as a result of this report. However, the options proposed for further exploration will likely require investment and will be subject to a separate future report to this Committee.

RECOMMENDATIONS

It is **recommended** that:

- 1) the Visitor Economy Strategy be reviewed in light of evolving economic and business needs, reporting back to a future meeting in the next three months on emerging issues and proposals;
- 2) that officers explore the potential for collaborative working with key stakeholders and partners on visitor economy issues for inclusion in the strategy; and
- 3) an updated version of the Visitor Economy Strategy is brought back to this Committee for approval.

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Constitutional Comments (CEH 05/07/2021)

Financial Comments [RWK 01/07/2021]

18. The report proposes further work be undertaken to evaluate a number of options regarding the Council's future role in Nottinghamshire's visitor economy. There are no specific financial implications arising from undertaking this work.
19. It is likely that adopting one of the options will result in future financial implications. Any financial implications arising from the recommended option will be addressed in future reports to Committee.

Background Papers and Published Documents

Except for previously published documents, which will be available elsewhere, the documents listed here will be available for inspection in accordance with Section 100D of the Local Government Act 1972.

- [Visit Britain "The value of tourism in England"](#) published
- [Visit Britain 2021 Tourism Forecast](#) published
- [COVID-19 Visitor Economy Recovery Planning Business Survey](#) published
- <https://www.gov.uk/government/publications/independent-review-of-destination-management-organisations-dmos/terms-of-reference#report-and-timing> published
- [Policy Committee 13 February 2019 – Visitor Economy Strategy](#) published
- [Policy Committee 19 June 2019 – Nottinghamshire Tourism Summit and Visitor Economy Strategy Year One Action Plan Framework](#) published
- [Policy Committee 13 November 2019 – Programme for Nottinghamshire's 2020 Mayflower Commemorations](#) published
- [COVID-19 Resilience Recovery and Renewal Committee 14 December 2020 – Food and Drink Sector Business Support Toolkit](#) published
- [Economic Development and Asset Management Committee 16 June 2021 – Progress on the COVID-19 Crisis Economic Recovery Action Plan](#) published

Electoral Division(s) and Member(s) Affected

- All