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Evaluation of the North-East Destination Development Partnership Evaluation Report



Destination
North East England



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List of Abbreviations

Abbreviation	Definition
B2B	Business to Business
DCMS	Department for Digital, Culture, Media & Sport
DDP	Destination Development Partnership
DMO	Destination Management Organisation
DNEE	Destination North East England
GFA	Grant Funding Agreement
LVEP	Local Visitor Economy Partnership
NE	North-East
NECA	North-East Combined Authority
SIC	Sectoral Industrial Classification
ToC	Theory of Change
TRP	Tourism Recovery Plan
UK	United Kingdom
VE	VisitEngland

Executive Summary

In 2022, the North East Destination Development Partnership (DDP) was established as a £2.25m pilot to address systemic challenges, enhance the region's global tourism standing, and catalyse growth in the region's Visitor Economy. Originally, spanning from November 2022 to March 2025, which has since been extended to March 2026, the pilot represents a collaborative effort involving NewcastleGateshead Initiative (NGI) as the accountable body, alongside its partners, Visit Northumberland and Visit County Durham.

This evaluation focuses on lessons learned and contributions to the DDP's objectives, with data and activities captured up until December 2024. As the pilot concludes in March 2025, some late-stage impacts and long-term outcomes will not be fully reflected in this evaluation, though a framework has been set to measure these future impacts. As such, the purpose of this report is to provide early findings ahead of the spending review in late spring 2025. The DDP have committed to a further evaluation on completion of the final year of the DDP (covering April 2025 to March 2026) which will assist in capturing the longer term impacts of the programme.

Key Impact and Strategic Contributions

The North East DDP pilot has **contributed to the recovery and growth of the Visitor Economy**, with visitor numbers and spending nearing 2019 levels post-pandemic and **progress ahead of schedule toward its 6% annual growth target (between 2022 and 2026)**. In real terms, the North East tourism sector contributed £6.1bn in gross value added (GVA) in 2023, representing a 38% increase from 2021. This figure exceeds the 2023 target of £5.0bn, surpasses the 2025 target of £5.9bn, and is close to achieving the 2026 target of £6.2bn. Key contributions include attracting investment in tourism infrastructure, improving international connectivity and awareness, supporting business events, and providing tourism focussed business support. Simultaneously, **the DDP has driven long-term structural change** through initiatives such as the 10-Year North East Tourism Strategy, supporting the hotel investment pipeline, and skills development, addressing barriers and positioning the region for sustained growth and resilience.

The DDP pilot has helped **shape a cohesive regional offer**, uniting the North East's diverse regions and assets into a compelling narrative for both leisure and business tourism. Building on this, promotional preparation efforts—including Travel Trade and FAM trips and collaborations with VisitBritain—**have elevated the region's national and international profile**. These initiatives have delivered tangible results, such as increased bookings, new partnerships, and strengthened positioning within key international markets.

The North East DDP pilot has **addressed fragmentation and strengthened collaboration by uniting seven local authorities, LVEPs, and national stakeholders, including DCMS, VisitBritain, and VisitEngland, under a cohesive governance framework**. Embedded within the region's devolution deal and supported by the 10-Year North East Tourism Strategy, the DDP has helped align regional priorities and **integrate the Visitor Economy into critical policy areas such as investment, planning, and transport**. This collaboration has **elevated tourism's profile as a key driver of regional economic and social development**.

The North East DDP pilot has **improved the quality and range of destination management activities** by supporting product development, delivering accreditation schemes, and driving inclusivity through targeted training initiatives. While strategic activities like the Accommodation Study and workforce development have laid a solid foundation for future growth, the pilot has also **advanced digital innovation. By championing new technologies, the DDP has empowered businesses to increase their digital presence and attract global audiences.**

The North East DDP pilot has **sought to address skills gaps in the Visitor Economy by tackling immediate workforce needs and building a talent pipeline to support long-term sector resilience and growth.** A comprehensive skills audit has informed regional policy and highlighted key challenges. Future-focused efforts, including collaboration with North East Higher and Further Education institutions to align curricula with industry needs, alongside discussions around a potential Tourism Centre of Excellence involving potential significant investment from Saudi Arabia, aim to ensure training provision adapts to the sector's evolving demands.

The North East DDP pilot has focused on attracting and growing events in the pilot area, adapting to challenges—particularly the delayed ICC SAGE Conference Centre. In response, the DDP refocused on **creating a pipeline for the Conference Centre when it opens and by attracting conferences to other venues and developing its own events including HITS Expo 2024 and Destination 2034. In June 2025, as a direct result of the DDP, Newcastle will be the first UK city to host X Design Week,** a leading digital innovation conference.. Additionally, the development of the Regional Business Events Strategy and the Ambassador Programme Toolkit has **enhanced the region's ability to target high-value events and foster local advocacy, laying the groundwork for long-term growth in business events.**

The DDP pilot has **emphasised sustainability within the Visitor Economy**, most notably through initiatives like the Regenerative Tourism Framework, which has **influenced national policies, including those of VisitEngland, and local strategies, positioning the North East at the forefront of sustainable tourism thinking.** Additionally, initiatives such as Green Tourism accreditation project have **empowered businesses to assess and improve their environmental footprint** while enhancing their appeal to eco-conscious visitors.

The DDP pilot has worked to shift the culture **by prioritising inclusivity and accessibility within the Visitor Economy**, ensuring the region is welcoming to all. Initiatives such as Proud Allies Training, AccessAble guided assessments, and the Everybody Welcome Campaign have equipped businesses to **foster inclusive environments and improve accessibility for diverse audiences.** The programme has also included tailored 1-2-1 clinics for businesses, funded 360 virtual tours to support accessible trip planning, and the launch of an online Accessibility Resource Hub on the Destination North East England website, providing practical tools and guidance to support continuous improvement. Collectively, these efforts have helped **upskill the current workforce, enabled businesses to respond to evolving visitor expectations, and ensured staff are empowered to deliver equitable services to all.** Awareness raising events such as Purple Tuesday have further **highlighted the importance of inclusive practices, embedding these values more deeply across the sector.**

Delivery and Process Review

Designing the DDP

The design phase of the North East DDP pilot focused on aligning regional interests, addressing challenges in the North East's Visitor Economy, and establishing a cohesive strategy for growth.

Early efforts, such as policy sprints and evidence gathering, played a critical role in informing the business case submitted to DCMS and fostering collaboration across the region and with key national stakeholders.

The pilot's **dual focus on short-term deliverables and long-term strategic goals shaped its overall design but created challenges**. The pressure to achieve quick wins, coupled with the pilot's ambitious long-term objectives, led to tension in resource allocation and prioritisation, at times hindering the pilot's ability and remit to focus on foundational, long-term changes needed for the Visitor Economy's growth.

The phased approach, which dedicated the first year to strategic planning and research, provided a solid framework for subsequent actions to be delivered in years two and three. This **approach ensured that the pilot was built on a well-researched and collaborative foundation**, enabling effective execution of the long-term strategy.

Marketing the DDP and its Activities

The DDP pilot used a blend of digital platforms and in-person events to promote its activities, incorporating both traditional methods like newsletters and innovative approaches such as podcasts and SIC-based identification. These **efforts were effective in engaging previously underrepresented businesses in the Visitor Economy, ensuring broad and inclusive reach**.

A key milestone was the creation of an identity and brand for the pilot. The **Destination North East England brand and website significantly elevated the region's visibility, achieving high engagement** and providing a central platform to showcase the North East's diverse assets. This has provided the pilot a platform to host the DDP's Travel Trade activity and drive engagement to the New Adventures website which helped increase local business visibility and sales.

Despite early challenges in securing buy-in, the **DDP pilot fostered regional collaboration in its marketing efforts through persistent stakeholder engagement**. Initiatives such as the dedicated communications group and the one-day DDP workshop were particularly effective in aligning marketing activities and building stronger connections across the region.

Delivering the DDP and the Types of Activity Delivered

The delivery of **the North East DDP pilot faced significant challenges due to compressed timelines caused by a delay in contracting**. As a result, the pilot was required to spend Year 1's 12-month budget within four months and deliver Year 2's activities in eight months, leading to financial and operational challenges. The **urgency of delivery and lack of staggered activities further added pressure, impacting engagement and sign-ups for some initiatives**.

The North East DDP pilot's delivery approach leaned on the existing and extensive networks and relationships held by NGI and its partners. Stakeholders largely agreed that these **networks were critical to ensuring the pilot's rapid rollout and addressing the capacity constraints faced in the**

early stages. The three LVEP's strong track record and established relationships were seen as key enablers of the pilot's ability to deliver complex initiatives within compressed timescales

While the DDP's **partnership structure provided a foundation for regional collaboration, some stakeholders expressed concerns about NGI's centralised role in overseeing project approvals and resource distribution.** While NGI played a crucial role in maintaining momentum within compressed timescales and navigating capacity constraints among partners, this centralisation limited input from other LVEPs, making it challenging for them to align their activities with the broader programme. There was a call for better utilisation of expertise across the LVEPs to optimise resources and improve collaboration during the delivery phase.

The North East DDP pilot implemented **a diverse range of activities aimed at strengthening the region's Visitor Economy and addressing key challenges. These initiatives, aligned with national and regional priorities,** laid the foundation for long-term growth.

Stakeholders recognised the pilot's key successes, including product development, research, advocacy work, and promotion preparation (such as FAM trips and travel trade initiatives). These initiatives were paired with visibility and engagement activities to amplify their impact, increase awareness, and extend the region's reach, ensuring that the North East's enhanced tourism offerings reached a wider audience and maximised their potential to attract visitors and investment.

Notable achievements included the creation of enhanced tourism products, such as the Regenerative Tourism Framework, alongside localised initiatives that drove product innovation. These initiatives, paired with business support and workforce development programmes, significantly improved the competitiveness of the region's tourism sector. Over the course of the pilot, **the DDP engaged nearly 1,450 individuals, businesses, and organisations, supporting over 1,150 through targeted interventions.**

The **North East DDP pilot successfully introduced destination management activities to areas of the region that had previously been underserved by such initiatives.** However, there were mixed views on the geographic distribution of activities, with some stakeholders feeling that regions like Newcastle and Gateshead received more focus, while others perceived other areas as less engaged. Despite this, the DDP's targeted efforts in areas identified as underrepresented were acknowledged. Monitoring data indicated that **79% of activities were region-wide, with significant efforts made to engage and support diverse areas of the North East.**

Managing and Governing the DDP

The management of the **North East DDP pilot was led by NGI, whose responsiveness and ability to adapt to changing demands, given the compressed timescales and ambitious objectives, was widely recognised by stakeholders.** However, the **reliance on a small core team within NGI created vulnerabilities in programme management and transition.** Stakeholders noted the need for clearer documentation of delivery strategies and better dissemination of roles and responsibilities. Robust transition and training plans were also identified as necessary to ensure programme continuity and accountability.

The DDP's **working groups were praised for fostering collaboration and facilitating the exchange of information among partners**. Stakeholders valued the open forum format, which brought together diverse voices, encouraged transparency, and enabled local leaders and representatives to share insights. However, some stakeholders noted that the time needed to gather input from the diverse membership occasionally slowed delivery. There were concerns about limited decision-making influence, with decisions often being made internally before being presented to the working groups, which left little room for critical feedback or adjustments. Late scheduling of meetings and agendas also hindered timely input from one stakeholder.

While the regional governance framework structure enabled clear oversight and coordination between local authorities, national stakeholders, and the DDP delivery team there were challenges in its implementation. Irregular meetings, inconsistent attendance, and the governance framework's positioning as an agenda item within Local Authority Chief Executives' meetings limited its effectiveness in ensuring timely and decisive action across the pilot.

The pilot's rapid pace and compressed timescales prioritised implementation over developing a robust monitoring system. As a result, in-house processes were used to track activities, but the **lack of central integration and oversight affected data consistency and quality**. This led to some gaps in data collection and a need to overcome fragmentation in the sharing of data and visibility of progress..

Legacy

The **North East DDP, while a pilot initiative, has demonstrated its potential as a strategic driver for regional development**, delivering short-term growth while laying the groundwork for long-term transformation. The pilot has successfully started to build a unified regional identity, focusing on the North East's cultural, natural, and historical assets, which has positioned the region as a compelling and cohesive tourism destination. However, stakeholders note that **further work is needed to fully solidify this vision and continue to promote the region's brand**.

To sustain this momentum, stakeholders emphasise the **need for continued investment, enhanced governance, greater collaboration across local authorities, and deeper integration of tourism into the North East's economic vision. The creation of NECA presents a significant opportunity in this regard**. With these measures, the region is well-positioned to fully realise its Visitor Economy's role as a catalyst for inclusive and sustainable prosperity.

1. Introduction and Background

The North East Destination Development Partnership (DDP) is a £2.25m pilot, covering the period from November 2022 to March 2025 (which has been extended to March 2026), which aims to grow the Visitor Economy within the local authorities of Durham, Gateshead, Northumberland, North Tyneside and Newcastle, South Tyneside and Sunderland.

The pilot is led by NewcastleGateshead Initiative (NGI), the lead and accountable body, working alongside Visit Northumberland and Visit County Durham, both of which also function as Local Visitor Economy Partnerships (LVEPs), to create a programme of activities funded by the Department for Digital, Culture, Media & Sport (DCMS) and managed by VisitEngland (VE – the Managing Authority).

1.1 The Original Case for Intervention

This section outlines the rationale behind the North East DDP pilot, exploring the changing tourism landscape following the COVID-19 pandemic and its relevance in addressing sector challenges. It examines the fragmented tourism sector in the NE, worsened by the pandemic, and discusses the 2021 DCMS de Bois review, which recommended a streamlined, tiered structure for Destination Management Organisations (DMOs).

The pilot was established to address these challenges through a coordinated approach focused on growth, sustainability, and alignment with national policies, aiming to unlock the region's tourism potential and drive long-term economic recovery. Understanding this context will underpin the evaluation of the DDP's delivery and early impacts and offer insights to guide future programme design and decision-making.

National Agenda Laying the Foundations for Intervention

In 2021, DCMS commissioned a review of Destination Management Organisations (DMOs) to explore England's untapped tourism potential and produce a more efficient model for supporting tourism, particularly considering the pandemic, which had a significant negative economic impact on the tourism sector. The review identified several key issues, including fragmented structures, unclear funding, and overlaps in roles, all of which could hinder recovery and limit future growth in the Visitor Economy.¹

To address this, de Bois (Chair of the Visit England Advisory Board) recommended restructuring DMOs into a tiered system.² This would create a national portfolio of high-performing destination organisations, with strategic regional partnerships like DDPs tasked with i) setting regional priorities

¹ De Bois, N. (2021) The de Bois Review: an independent review of Destination Management Organisations in England, Department for Digital, Culture, Media & Sport. Available [here](#).

² VisitBritain. (n.d.). The DMO review. Accessed: 02/01/2025, Available at: <https://www.perplexity.ai/search/how-would-i-reference-this-at-ofnGdhtaSNqLSbUUI ktw>

aligned with national strategies and ii) focusing on skills, sustainability, inclusivity, levelling-up, investment, events, product development, and data.

The proposed structure aims to streamline collaboration across local, regional, and national levels, enabling a more effective recovery and future growth of the tourism sector:³

1. **DCMS:** At the top of operations, setting national agendas, policies, and strategies.
2. **National Bodies:** including Visit England and Visit Britain, that facilitate the delivery of DCMS objectives by working with DMOs.
3. **DMOs:** Operating below the DCMS and National Bodies, DMOs carry out the aforementioned tasks in line with national priorities. The Destination Development Partnership is placed within this layer.
4. **LVEPs:** Are collaborative networks or partnerships designed to support and promote the local tourism and Visitor Economy within a specific geographic area. In this structure, they provide local leadership and governance in tourism destinations across the country.
5. **Destination Organisations:** These organisations work under LVEPs, managing the marketing of local destinations, facilitating connections between tourist businesses, products, services and infrastructures and visitors.

The COVID-19 Pandemic's Damaging Effects on Tourism

The COVID-19 pandemic brought tourism in the UK to a near standstill in 2020:

- Air passenger arrivals to the UK dropped by 98.3% from February to April 2020.⁴
- Accommodation and travel agency businesses experienced a drastic decline in turnover, whilst employment in visitor accommodation fell by 21.5% in the three months to June 2020 compared to 2019.⁵

The UK Government responded with the Tourism Recovery Plan (TRP) in June 2021, which set out goals to rebuild the sector, these included (and assessed again in Chapter 6.1):⁶

- Aim 1: Restoring pre-pandemic tourism levels;
- Aim 2: Ensuring all regions benefit from recovery;
- Aim 3: Promoting innovation, sustainability, and inclusivity;
- Aim 4: Improving heritage and environmental conservation; and
- Aim 5: Positioning the UK as a leading destination for business events.

North East Visitor Economy performance

The North East Visitor Economy has substantial growth potential, supported by its diverse range of historic and cultural assets. These include World Heritage Sites like Hadrian's Wall and Durham Cathedral, two National parks which possess Dark Skies status, six blue flag beaches and other award-winning attractions.

³ VisitEngland (2023) Local Visitor Economy Partnership Programme. VisitBritain. Available [here](#)

⁴ ONS (2021), Coronavirus and the impact on the UK travel and tourism industry. Available [here](#)

⁵ 'bid.

⁶ Tourism Recovery Plan (2021). Available at: <https://www.gov.uk/government/publications/tourism-recovery-plan>

Despite these strengths, several challenges hinder the region's performance compared to other areas in England, including:

- Fragmentation in destination management, with inconsistent funding for DMOs across local authorities
- Limited awareness of the region's tourism offer
- Underinvestment in transport and Visitor Economy infrastructure.

These factors contribute to the NE's relatively weak tourism performance. As shown in Table 1.1, the North East region accounted for only 3% of England's overnight trips, the lowest of any region.

Table 1.1: Regional Visitor Performance in 2021

Region	Inbound Visitor Numbers (2021)	Inbound Spend (2021)	Domestic Day Visits (2021)	Domestic Spend per visit (2021)
London	2.6m	2,559m	86m	4,055m
South East	0.78m	532m	92m	3,255m
North West	0.70m	614m	79m	2,959m
South West	0.37m	233m	65m	2,627m
East of England	0.51m	299m	56m	1,751m
West Midlands	0.41m	363m	56m	2,261m
Yorkshire	0.22m	215m	40m	2,114m
East Midlands	0.24m	152m	44m	1,287m
North East	0.11m	101m	16m	552m

Source: Great Britain Tourism Survey and International Passenger Survey, 2021

1.2 The Intervention: North East DDP Pilot

To address these challenges, the North East DDP pilot was established to provide a cohesive and strategic focus on the Visitor Economy. The partnership sought to unlock the region's untapped potential by improving attractions, developing new experiences, expanding into new markets, and driving economic growth, with the headline objectives to:

- unlock the potential in the North East Visitor Economy delivering 6% growth per annum for the period of the pilot DDP (2022-26), using 2021 economic performance figures as the baseline, to stimulate wider, long-term growth to double the sector's contribution over the next decade;⁷
- create a pilot DDP that disseminates best practice and learning on overcoming fragmentation and creates a co-ordinating framework for the regional Visitor Economy that is easily replicated by other LVEPs elsewhere in England; and
- ensure that through working with DCMS and VisitEngland, the LVEPs involved in this pilot can demonstrate clear evidence of the success of this approach resulting in the roll-out of the DDP structure nationwide.

Activities were designed to deliver against the North East DDP's objectives and were largely categorised according to the intervention themes set out in DCMS' TRP:

- **Business Engagement, Communications, and Governance** - through webinars, economic data publication, toolkits, website development, and stakeholder events.
- **Business Events** - strengthen infrastructure and strategy through audits, strategy development, ambassador promotion, trade show participation, and long-term planning.
- **Skills** – improvements in workforce skills and talent attraction through workforce analysis, talent attraction guides, a virtual skills portal, an expo, and feasibility studies.
- **Product Development** – through business support workshops, developing active travel packages and conducting feasibility studies.
- **Travel trade activity** – including FAM trips attending trade shows and conferences, building travel trade website, working with travel media to promote the region to buyers in various international markets.
- **Accessibility** – enhancement through inclusive initiatives, training, innovative projects, and strategic development.
- **Sustainability** – promotion through research and advocacy, business support and developing local supply chains.

⁷ As per the Grant Funding Agreement (GFA), the original baseline year was 2019; however, it was agreed to change this to 2021. This adjustment reflects the year prior to the North East DDP Grant Funding Agreement being officially signed (in late 2022), accounting for the significant effects of COVID-19 and shortened delivery timescales (see Chapter 2). Furthermore, using 2021 as the baseline provides a more accurate representation of the impact and role of the DDP in supporting the sector's recovery, in line with the objectives of the Tourism Recovery Plan published in 2021.

1.3 Evaluation Objectives and Approach

In line with the programme's objectives, the evaluation seeks to review the delivery of the pilot programme to understand what worked well, areas for improvements and lessons learnt (as part of the Process Review in Chapter 3), and evaluate the early outcomes and impacts of the pilot (see Chapter 3 and 4) to inform future DDP programme design, funding decisions and to inform longer-term strategy of tourism management policy.

A comprehensive set of Evaluation Questions, outlined in Appendix A, was developed to support this analysis. To answer the Evaluation Questions, the report draws on

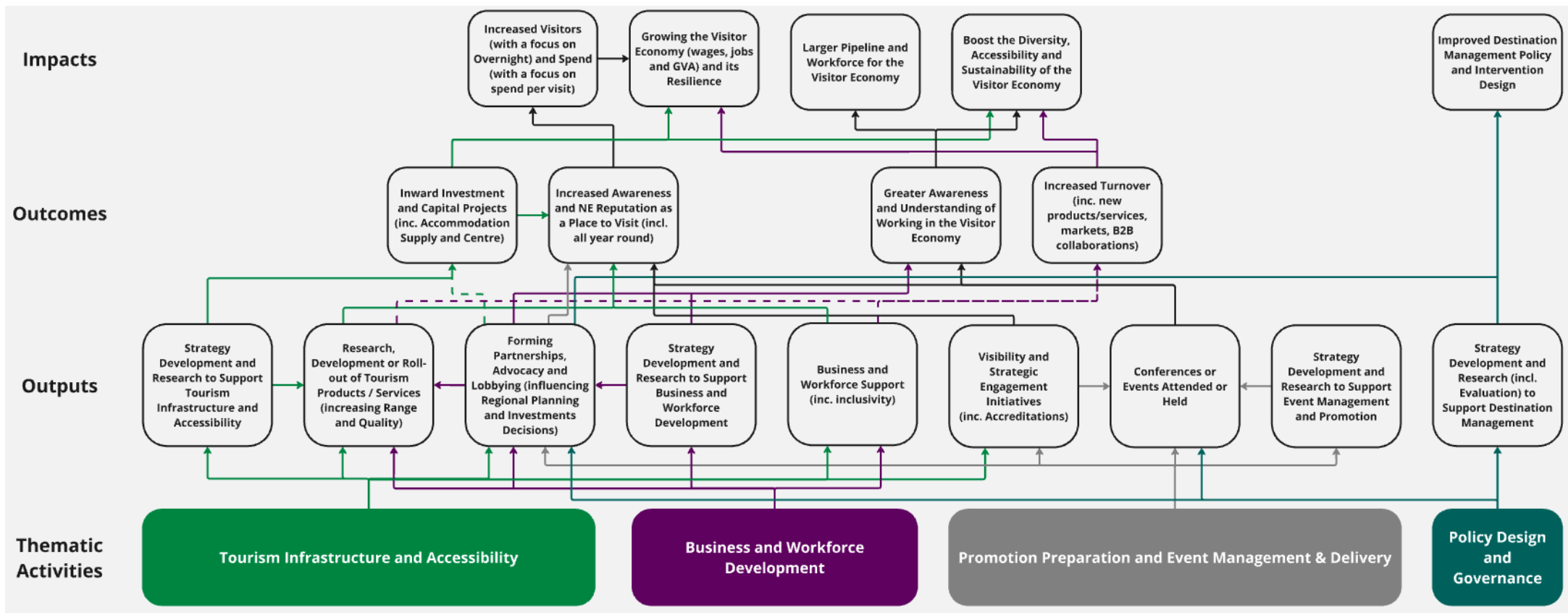
- **In-Depth Interviews:** a total of 46 interviews or focus groups with 54 interviewees, including nine members of the core delivery team and those closest to the programme, and 45 with wider stakeholders and Visitor Economy representatives.
- **Case Studies:** a total of nine case studies are included in this evaluation to demonstrate the DDP's work at the organisation and project level.
- **Engagement and Support Monitoring Database:** developed specifically for this evaluation, incorporating data from 48 North East DDP-funded activity registration documents.
- **Activity Database:** a detailed list of initiatives, activities and outputs the DDP have delivered.

Theory of Change

As part of the evaluation, an analysis of each planned activity (listed in DDP's Year 1, 2, and 3 Delivery Plans) was mapped to the North East DDP's objectives – see diagram overleaf. The purpose was to understand the contribution pathways of each activity to their intended effect. In doing so, activities were categorised into four key activity themes which this evaluation will present findings against below.

- **Tourism Infrastructure and Accessibility**
- **Business and Workforce Development**
- **Promotion Preparation and Event Management & Delivery**
- **Policy Design and Governance**

Figure 1.1: The North East DDP Pilot Theory of Change



Considerations for and Limitations of the Evaluation

- **Evaluation Timing** – The DDP is set to conclude in March 2025, with activities continuing until the final month. Due to timing constraints, this evaluation incorporates data and activities up until December 2024, which means certain activities and outcomes that occur after this period were not captured. As a result, some late-stage impacts will not be included in this evaluation.
- **Timelag** – A significant portion of the DDP's activities took place between 2023 and 2025, and given the time lag inherent in measuring outcomes, the secondary data accessible to the evaluation only covers at best to 2024. This does not fully account for the longer-term impact of the pilot. Many activities are designed for long-term transformation, meaning their effects will not be fully visible within the evaluation's timeframe. This, coupled with the timing of the evaluation, presents a challenge in determining the net contribution of the North East DDP to its headline objective of delivering 6% growth per annum. To address this, a framework has been set out to measure the expected impacts, drawing conclusions based on the Theory of Change (see Figure 1.1 above), and capture the wider economic and strategic value of the DDP.

It is recommended that a follow-up evaluation be conducted in the future to assess the full impact of the DDP and its long-term contributions towards achieving the 6% growth target and the wider strategic objectives.

- **Programme Data** – As outlined in Chapter 3, the absence of a comprehensive monitoring framework at the start of the North East DDP posed challenges in fully capturing the breadth of activities and assessing their complete impact. The evaluation has made efforts to compile data from all available sources, though gaps may exist. The data collected is expected to be largely comprehensive but may not fully reflect every element of the pilot.
- **Engagement and Support Monitoring Database** – A dedicated database was developed for this evaluation, incorporating data from 48 North East DDP-funded activity registration documents. However, it's important to note that registration data does not necessarily reflect attendance. An added consideration is that, with many activities still ongoing, this database may not capture the full scope of engagement or final support outcomes. Additionally, not all monitoring forms collected the necessary data, so a conservative approach was adopted in determining the number of businesses and individuals engaged or supported, counting only those with unique email addresses.

2. An Evolving and Challenging Delivery Context

The North East DDP operates within a landscape shaped by economic trends, political shifts, and changing visitor behaviours – trends that are not unique to the North East but also present in other regions. The delivery of the pilot has been influenced by a set of contextual factors, which present both challenges and opportunities for achieving the programme’s objectives. Together, these contextual factors illustrate the complexity of delivering the North East DDP pilot. Insights have been informed by a synthesis of key stakeholder interviews, capturing perspectives from those involved in the delivery, management, and the receipt of the programme.

Summary of Key Messages

The following key messages highlight the primary factors influencing the DDP’s delivery:

- **Delays in contracting with National Government:** DCMS announced grant funding for the DDP pilot in November 2022, but the funding agreement was signed in February 2023.
- **Post-Covid recovery:** the North East visitor economy has shown notable recovery, but visitor numbers and spending remain below pre pandemic levels.
- **Major visitor attractions:** The North East has underrepresentation in VisitBritain’s Top 20 attractions; Beamish Museum was the only attraction in the Top 20 paid attractions in 2022.
- **Economic changes:** rising costs and inflation have impacted the North East visitor economy, limiting growth despite increased visitor numbers. Inflation-adjusted spending in 2023 grew by £35m, and visitor spending in the North East remains behind other UK regions.
- **Transport and connectivity:** Strong road and rail links support tourism, but high train costs and strikes hinder accessibility and deter longer tourist stays. However, Newcastle Airport, with connections to over 80 destinations, contributes £1.16bn annually to the region.
- **Political changes:** The North East Combined Authority (NECA), established in May 2024, aims to double the visitor economy by 2034 through investment, improved connectivity, and collaborative marketing. National policy shifts have also restructured regional tourism under the Conservative Government, with a greater emphasis on sustainability, skills, and accessibility, which the new Labour Government has adopted.

Delays in Contracting with National Government

DCMS announced in November 2022 the business case to provide a grant award, covering the three financial years 2022-25, to NGI to deliver the DDP pilot. The grant funding agreement (GFA) between VE and NGI was signed in February 2023. These delays in announcement and contracting significantly compressed the effective delivery period of the pilot to just over two years, from February 2023 to March 2025. As a consequence, it is likely that the full potential of the pilot has not been realised given the abridged delivery timeframes.

Post-COVID Recovery

The North East has demonstrated notable recovery in its Visitor Economy following the pandemic, although total visitor numbers and spending have not yet returned to pre-pandemic levels. Latest data from VE, shows the North East has led the country in visit volume growth in 2023, with a 31% increase compared to 2022, followed by London with a 25% increase. Total visits to the North East reached 37 million in 2023, accounting for 4% of all visits in England.⁸

The project uses 2021 as its baseline, with all subsequent analyses referencing this starting point. Day visits have seen significant growth, with urban centres, countryside, and coastline drawing travellers for day trips. Northumberland remains a regional leader in visitor numbers, recording over 8 million day visits in 2022, with new attractions such as Lilidorei and Ad Gefrin expected to sustain growth into 2024 and beyond.⁹

While rural areas initially recovered faster in overnight stays, even surpassing 2019 figures in 2022, urban centres like Newcastle, Sunderland, and Gateshead are catching up, driven by live events such as concerts at St. James' Park and the Stadium of Light. Across England, visits to cities and large towns increased in 2023, reaching 565.8 million, up from 496.6 million in 2022.¹⁰

International tourism, however, presents a mixed picture. Total international visits to the region declined by 11% in 2022 compared to 2019, with spending dropping by 16%. Despite this, international visitors remain a lucrative segment, spending an average of £623 per trip compared to £262 by domestic overnight visitors.¹¹

In terms of visitor spending, the North East had one of the smallest shares in England, with £1.6 billion in 2023, accounting for 3% of total spend. However, apart from the North West and West Midlands, all other regions saw an increase in visitor spending in 2023 compared to 2022, with the largest increase noted in London (40%), East Midlands (22%), and South East (21%).¹² The North East's visitor spending trajectory will be important to monitor as new attractions continue to develop and marketing efforts expand.

Major Visitor Attractions

The North East's array of attractions contributes significantly to its tourism appeal. However, data from 2022 highlights challenges and opportunities in this area. Beamish, the Living Museum of the North, was the only North East attraction to feature in VisitBritain's Top 20 paid attractions for 2022, ranking 15th. In addition, Hardwick Park and the Baltic Centre for Contemporary Art were the only other regional attractions to make it into the Top 100. The region also has no attractions in VisitBritain's Top 20 free attractions for 2022. This underscores a relative underrepresentation of North East attractions in the national visitor landscape, which can be attributed not only to visitor numbers but also to the frequency and volume of returns, affecting their overall ranking.¹³

⁸ Great Britain Tourism Survey, GBTS Domestic Day Visits 2022-2023, Published 14 February 2025

⁹ Destination North East England (2024) Visitor economy evidence base

¹⁰ GBTS Domestic Day Visits 2022-2023

¹¹ Ibid

¹² Ibid

¹³ Destination North East England (2024) Visitor economy evidence base

Further, the pandemic has shifted traveller preferences toward local and nature-based tourism, which could work to the North East's advantage.¹⁴ The region's tourism offerings—such as stargazing in Northumberland's Dark Sky areas, coastal walks in Durham, or the diverse landscapes managed by the Northumberland National Park Authority—ensures that variable weather does not diminish the overall appeal.

While the region experienced a +29% growth in paid for and free admissions in 2022 compared to 2021, it is still significantly behind pre-pandemic levels, with a -40% decline in admissions compared to 2019.¹⁵ This indicates a strong recovery trajectory but also highlights the need for sustained efforts to attract both first time and returning visitors back to the region.

The region's UNESCO World Heritage Sites, which include Durham Castle and Cathedral and Hadrian's Wall, are globally significant assets yet to fully realise their potential as economic drivers for the region. Challenges for Hadrian's Wall, including its span across three DMOs and limited spend opportunities, highlight the importance of strategic coordination and targeted marketing.¹⁶

Economic Changes and the Cost of Living Crisis

The Visitor Economy in the North East has been significantly impacted by the ongoing cost of living pressures and rising inflation, particularly since the latter part of 2022 and into 2023, presenting challenges for securing growth in the sector.

As the cost of travel has increased, many prospective tourists have cited financial pressures as the primary barrier to domestic travel. These pressures have been felt across many regions in the UK, including the NE, where rising costs have influenced visitor spending patterns. Despite this increase in visitor numbers, the true economic impact of tourism has been subdued due to inflation. While visitors spent over half a billion pounds more in 2023 than in 2022, the inflation-adjusted growth was £35m, bringing the region's economic impact from tourism to £6.1 billion.¹⁷

Across all regions, the continued cost of living pressures has meant that visitors are spending less, even as the volume of visits grows. Further, NE's Visitor Economy, although large, continues to lag behind other UK regions in terms of overall visitor spend. For example, the North East's inbound visitor spend in 2023 was £360 million, lower than that of regions such as the North West (£2.2 billion), Yorkshire (£644 million), East Midlands (£600 million), and the West Midlands (£1 billion) in the same year.¹⁸

Transport and Connectivity

Transport infrastructure and connectivity are vital for the DDP's success and the North East's tourism economy.¹⁹ While the region benefits from strong road links including the A1(M), A19, A69, Durham railway links, and a major hub at Newcastle Central Railway Station, challenges in accessibility hinder the DDP's implementation. Newcastle Central Railway Station sees over 8.9m

¹⁴ VisitEngland (2020) Domestic Tourism Recovery Report

¹⁵ Ibid

¹⁶ Ibid

¹⁷ [Destination North East England \(2024\)](#)

¹⁸ Visit Britain (2023) IPS Nations and Regions Annual Inbound Update

¹⁹ Visit Britain (2020) Internal modes of transport

passengers annually and offers fast links to key cities, with growth projections of 60-100% by 2043.²⁰ However, high train costs, especially for international visitors without advance bookings, remain a barrier, though services like Lumo are offering lower-cost options.²¹

Challenges include persistent rail strikes, with widespread cancellations by operators such as LNER and Northern Rail in 2023 and 2024,²² and local disruptions from Go North East's indefinite strike. These issues strain alternative transport and damage consumer confidence. Furthermore, fragmented services in rural areas like County Durham and Northumberland, coupled with limited integration between transport modes, exacerbate mobility challenges and transport poverty, deterring tourists from staying longer in the region.^{23,24,25}

This is reflected in inbound tourism data, where North East visitor numbers declined by 4%, compared to a 21% national increase.²⁶ Despite a 16% rise in regional spend, poor connectivity remains a barrier to growth. Addressing transport issues is crucial for achieving equitable and sustainable tourism development.

There are some positive developments such as EasyJet's relaunching of routes at Newcastle International Airport.^{27,28} In 2022, the airport, served 4.1m passengers with connections to over 80 destinations. It contributes £1.16bn annually to the regional economy. Its proximity to Newcastle city centre, commitment to low carbon emissions, and 2023 'Airport of the Year' award highlight its growing importance. Expanding long-haul services beyond Dubai could further boost international tourism.²⁹

Political Changes

Political developments, including leadership changes and the formation of the NECA, have significantly shaped the delivery of the DDP by influencing policy, funding, and governance in regional tourism and economic development.

National policy shifts, such as the UK government's 2021 TRP,³⁰ have guided regional efforts, emphasising sustainability, skills, accessibility, and business tourism. The de Bois review³¹ of DMOs led to structural changes, including the creation of LVEPs and a new accreditation system, with the North East selected as a pilot region due to its alignment with Levelling Up goals and strong public-private partnerships.

²⁰ Destination North East England (2024) Visitor economy evidence base

²¹ Ibid

²² [RSM](#)

²³ Visit Northumberland. Northumberland Destination Management Plan 2022-2032

²⁴ [Net Zero North East England](#)

²⁵ Transport for the North (2021) Visitor Economy and Transport in the North of England

²⁶ [Source](#): United Kingdom Tourism Survey and International Passenger survey, 2023 – ranked by inbound spend.

²⁷ [EasyJet relaunches flights from Newcastle Airport to Amsterdam - Chronicle Live](#)

²⁸ [Newcastle Airport](#)

²⁹ Destination North East England (2024) Visitor economy evidence base

³⁰ Department for Digital, Culture, Media & Sport. (2023). Update on Delivery March 2023: *Tourism Recovery Plan*. HM Government. Available [here](#).

³¹ De Bois, N. (2021) The de Bois Review, Department for Digital, Culture, Media & Sport. Available [here](#).

NECA, established in May 2024, brings together seven local councils, enabling regional powers to attract investment, streamline infrastructure, and coordinate tourism. Its ten-year plan aims to double the Visitor Economy by 2034, aligning with DDP objectives and focusing on collaborative marketing and improved transport connectivity to drive regional economic growth.³²

The 2024 general election and Labour government's emphasis on "Local Government" over "Levelling Up" presents both challenges and opportunities for the DDP. Labour's focus on regional inequalities and infrastructure improvements may offer support for the DDP's future framework.³³³⁴

³² [The North East Combined Authority](#)

³³ Labour Party (2024). Power and partnership: Labour's Plan to Power up Britain. Available [here](#).

³⁴ North East Combined Authority (2025) *Region showcases ambitions for the Visitor Economy to new Tourism Minister*. Available [here](#).

3. Progress Against the DDP's Objectives

The pilot was launched to unlock the growth potential of the North East Visitor Economy, address structural challenges, and position the region as a competitive and sustainable destination for leisure and business tourism. This chapter evaluates the DDP's impact by assessing its performance against its headline and strategic objectives as set out in its Grant Funding Agreement and its wider impacts.

Summary of Key Messages

- The contribution of the North East Visitor Economy has grown by 38% since 2021, contributing £6.1bn in GVA in 2023. Against the North East DDP target, this progress is ahead of schedule, with 2023 figures exceeding the 2025 target of £5.9bn and approaching the 2026 target of £6.2bn.
- The DDP has delivered tangible short-term contributions that directly support the NE's Visitor Economy growth target. These include investments in attractions, international connectivity, business events, and support for tourism businesses. At the same time, the DDP has laid the groundwork for long-term structural change through initiatives such as the 10-Year North East Tourism Strategy, supporting the development of the hotel investment pipeline in the North East, and skills development.
- By uniting the region's seven local authorities and embedding the Visitor Economy into the region's devolution deal, the DDP has created a collaborative framework to position the North East as a competitive and sustainable tourism destination.
- The DDP has raised the North East's national and international profile by promoting a cohesive regional identity, delivering targeted initiatives like the Travel Trade programme and working with VisitBritain on their amplification efforts, which have led to tangible benefits such as increased bookings and new partnerships.
- The North East DDP has improved the quality and range of destination management activities across the region by supporting product development, delivering accreditation schemes, and enhancing inclusivity through training. Whereas strategic activities, such as the Accommodation Study and workforce development efforts, have laid the foundation for the future.
- The North East DDP has elevated the profile of tourism by fostering collaboration among local authorities, aligning regional priorities, and embedding Visitor Economy considerations into investment, planning, and transport decisions.
- Despite external challenges, the DDP has laid the groundwork for a more strategic approach to business events. Early achievements include notable events, the development of the Regional Business Events Strategy, and the Ambassador Programme Toolkit, positioning the North East for future growth in this sector.

3.1 Unlocking Growth Through the Visitor Economy

The North East DDP pilot set a headline objective to unlock the potential of the region's Visitor Economy by delivering 6% annual growth during the pilot phase (defined as 2022–2025) and stimulated wider ambition of doubling the size of its contribution (from £4.4bn to £8.9bn) in 10 years, using 2021 as the baseline year.

Progress Toward Target

According to STEAM data, in real terms, the North East tourism sector contributed £6.1bn in gross value added (GVA) in 2023, representing a 38% increase from 2021.³⁵ This figure exceeds the 2023 target of £5.0bn, surpasses the 2025 target of £5.9bn, and is close to achieving the 2026 target of £6.2bn. These results alone indicate that the region is ahead of its schedule, suggesting a strong trajectory toward meeting the DDP's long-term objectives, barring any significant downturns in performance.

Evaluating the DDP's Contribution

With many of the DDP's activities commencing in 2023, much of the pilot's impact is expected to materialise and be captured in datasets, including STEAM, over the coming years. However, tangible examples of direct contributions to growth are already emerging, which will have directly influenced the 2023 figures:

- **Attraction Openings and Investments:** In 2023, 8 new attractions opened in the North East with a combined investment value of £55m.³⁶ A further 3 attractions opened in 2024, totalling £8m in value, alongside 60 new bars and restaurants, highlighting the scale of development activity and its economic significance.³⁷ In 2025, an additional 7 attractions are set to open, with a combined investment of over £45.5m.³⁸

While many of these investments were already in the pipeline, the DDP has played a crucial role in bolstering investor confidence and bringing together and scaling regional investments. One example includes Raby Castle, which previously only had a localised impact in County Durham, are now integrated into broader regional tourism itineraries, such as those linking it with Alnwick Castle and Bamburgh Castle. Through the DDP's Travel Trade initiatives, this collaboration has created 48-hour itineraries for tourists, driving additional revenue across the region's visitor economy.

- **Norwegian Ferry Policy Sprint:** involving 24 stakeholders, has helped to restart discussion about ferry connections between Bergen and Port of Tyne, potentially enhancing international connectivity and attracting more international visitors;

³⁵ GVA is a measure of the value generated from the activities leading to the production of a good or service

³⁶ Ad Gefrin, Lilidorei, Everlast Gym, Remaking Beamish, Seventeen Nineteen, Tapyard Studios, The Exchange 1856, Treetrop Adventure Golf Metrocentre.

³⁷ Milecastle Hotel, Sheepfolds Stabled and St James STACK present by Sela

³⁸ Bamburgh Walled Garden, Eatflox, Freight Island Eldon Square, Culture House Sunderland, STACK Newcastle

- **Travel Trade:** The DDP hosted FAM trips and trade missions targeting international markets, resulting in tangible bookings such as the arrival of 125 international tourists from a VisitBritain Spain Travel Trade Fam Trip and increased interest from global tour operators. DDP also for the first time hosted a Coach Tourism Association Conference where 200 delegates were offered FAM trips to various locations across the region. Additionally, 16 officers from UKinbound (trade association with over 400 members) were taken on corresponding North East FAM trips culminating in a business dinner at Blackfriars with regional partners. To increase market reach DDP also hosted FAM trips for buyers and travel trade media agents from countries such as Italy, India, the US, Germany, Ireland, Switzerland Belgium and Sweden. In January 2025 alone, the DDP hosted 40 tour operators from various markets including India, Italy, and the US;
- **VisitBritain Amplification:** in addition to the increased international awareness (see Section 3.2), the TripAdvisor partnership in France and Germany, led to a 92% increase in bookings to Newcastle. Additionally, VisitBritain B2B work, including events and webinars, attracted 3,131 attendees, resulting in new business with 6 operators (Beautiful Britain, Garden Tours, BBT Travel, Studiosus Reisen, Tourist Forum, and Dakari) adding the region to their programmes. Already, a group trip (Dakari) for 130 with a value of £87,750 has already taken place and Italian operators are promoting the region to attract an estimated 800 visits (c. £450,000);
- **Business Support:** there have been several initiatives which have sought to develop and grow Visitor Economy businesses, thereby directly contribute to its size, such as the 40 businesses across North East that joined New Adventures which increased exposure for local offering and 108 that have accessed other support to develop new tourism products.

Laying Foundations for Long-Term Growth

The DDP's inherent value lies in its role as a strategic convenor, influencer, and advocate to foster structural change within the region's Visitor Economy. Particularly those activities which seek to create sustainable growth mechanisms and align the region with long-term national and regional priorities. Key example initiatives that have set the foundation for this structural change include:

- **Hotel Investment Pipeline:** Since the inception of the DDP, there has been a significant increase in investor interest in the North East's accommodation sector. The DDP has played an enabling role by providing research and intelligence that has strengthened investor confidence and helped scale activity to the regional level:
 - The development of the accommodation audit and strategy has engaged over 50 potential developers interested in North East investments. Of these, 16 hotel projects are actively progressing, representing a pipeline investment valued at £162 million, and an expansion of approximately 1,300 rooms or beds.
 - Investment into **Dakota and Hotel Gotham** was strengthened by the **Accommodation Study**, which provided investors with evidence to validate their decision-making.

- **Travel Trade activity** funded via the DDP contributed to confirming investment into **Bailiffgate Hotel**, as insights from these activities allowed investors to forecast stable business levels, giving them greater confidence in the market.

While many hotel investments were already in the pipeline, the DDP has **helped de-risk decision-making and provided greater confidence to investors**, particularly by offering data-led insights that reinforced the region's potential for sustainable visitor demand.

- **10-Year North East Tourism Strategy:** providing a cohesive roadmap for aligning efforts across local authorities, businesses, and stakeholders;
- **Integration into the Devolution Deal:** the inclusion of the Visitor Economy in the devolution deal underscores its strategic importance to the North East's regional vision and objectives;
- **Regional Business Events Strategy:** maximising the potential of the development of the ICC SAGE conference centre by laying the groundwork for attracting and managing large-scale events in the future, positioning the region as a hub for international business tourism; and
- **Skills and Workforce Development Initiatives:** addressing persistent skills gaps through projects like the VR Careers Inspiration Project and collaborations with local colleges to shape curricula and lay the groundwork for a Tourism Centre for Excellence.

The North East DDP has delivered tangible contributions toward its short-term growth targets, with early successes evident in driving investment, facilitating business events, and amplifying the region's profile both nationally and internationally. Beyond these immediate achievements, its enduring value lies in fostering structural change and creating a foundation for sustainable growth within the North East's Visitor Economy. Key initiatives—such as developing a unified 10-Year Tourism Strategy and embedding the Visitor Economy into the region's devolution deal—are critical milestones that the DDP has been important in realising.

Most critically, by uniting the region's seven local authorities and stakeholders under a shared vision, the DDP has fostered a cohesive and collaborative approach to using the Visitor Economy as a strategic driver for regional development.

3.2 Contributions to the DDP's Stretch Targets

The stretch targets set for the pilot were designed to guide progress toward the headline objective of achieving 6% annual growth during the pilot phase. These targets, developed through research and extensive stakeholder engagement (see Programme Design in Section 5.1), focused on key opportunities for growth in the North East. While the evolving delivery context presented challenges (as outlined in Chapter 2), these targets provided a useful framework for shaping the programme's direction, with progress continuing to be monitored and adjusted as needed.

When assessing the pilot's contributions to each of the stretch targets, it is important to note that the region is ahead of schedule in delivering against its headline objective, as discussed in Section 3.1. This suggests that while the stretch targets remain a valuable guide, they may not fully capture the complexities and longer-term impacts of the programme's activities.

- **Overnight visitors** - the DDP set a target to increase the share of overnight visitors from 10.4% to 12.9%, aiming to generate an additional £428 million in revenue. This was driven by attracting international and business event visitors — segments associated with longer stays and higher spending. According to STEAM data, in 2023, the share of overnight visitors reached 11.0%. Given that much of the DDP's activity occurred in 2023, the impact of key initiatives like the Travel Trade programme and targeted international campaigns will likely contribute to further progress toward the target.
- **Business Events** - the pilot also aimed to attract an additional 100,000 business event delegates per year by 2025—estimated to generate around £39.9 million in annual spend. However, the pilot faced challenges in attracting and growing business events, mainly due to delays in the ICC SAGE Conference Centre. In response, the DDP shifted focus to creating a pipeline for future events at the Centre and attracted conferences to other venues. Early successes include events such as the HITS Expo 2024 and the Destination 2034 Conference.

Despite challenges, the DDP has achieved early successes in facilitating events that will have generated significant economic impact. Notable events such as the Coach Tourism Association Conference, the HITS Expo 2024, and the Destination 2034 Conference, along with SFA Connect's support in generating 16 conference leads (three of which converted into live bids), highlight the DDP's role in business event attraction. One confirmed event, the Nutrition Society Conference in July 2026, will bring 400 delegates to Newcastle, boosting local spend through hotel stays, dining, and tourism.

- **Employment and Jobs** - a further stretch target sought to support 10,000 full-time equivalent (FTE) jobs into the Visitor Economy pipeline by 2025 through skills development. Although it is not yet possible to quantify this contribution, and unlikely the pilot has delivered against this stretch target, stakeholders noted that efforts to shape the curriculum at four regional universities and further education colleges to lay the foundation for a Tourism Centre of Excellence were seen as a step in the right direction, with the DDP accelerating conversations at both regional and national levels.
- **Attracting capital investment** - the indicative target of unlocking £100 million in capital investment for the Visitor Economy. As noted in Section 3.1, while much of this investment was already in the pipeline, the DDP has played a key role in boosting investor confidence. As of 2025, 18 attractions (excluding 60 new bars and restaurants) are open or are scheduled to open, with total investment nearing £110 million. The hotel investment pipeline alone, with 16 active projects worth £162 million, indicates alignment with this target. The DDP's market insight and confidence-building initiatives, such as the Accommodation Study, played a crucial role in supporting investment decisions from investors like Dakota and Hotel Gotham.
- **Business Growth** - the DDP aimed to support SME growth within the Visitor Economy and since February 2023, the North East DDP has delivered 109 activities, including events, research outputs, and partnerships and engaged just under 1,450 individuals, businesses or organisations linked to the Visitor Economy, of which supported just over 1,150. Initiatives

such as the New Adventures Programme, business masterclasses, and the Ambassador Programme have helped raise awareness, connect businesses with regional initiatives, and improve growth conditions. A more detailed assessment of business and workforce development can be found in Section 6.3.

3.3 Contributions to the DDP's Strategic Objectives

The North East DDP was established to address structural challenges within the region's Visitor Economy and to align local efforts with a shared strategic vision. In addition to its overarching growth objective, the DDP sought to achieve several strategic objectives which are assessed in turn below.

Objective 1: Increase the quality and the range of destination management activities being undertaken across the North-East of England

Stakeholders broadly agreed that the pilot has contributed to enhancing the quality and range of destination management activities across the region. By supporting LVEPs and other regional stakeholders, the DDP has enabled the delivery of activities previously beyond their capacity. While some initiatives have already demonstrated tangible impacts, others are laying the groundwork for long-term improvements.

Immediate Contributions to Range and Quality

A focus on product development has supported 108 businesses in creating new bookable tourism products that showcase the NE's unique offerings. Accreditation schemes such as the Green Tourism and Visitor Ready certifications have helped businesses align with industry quality standards. Additionally, initiatives like Proud Allies Training and AccessAble Guided Assessments have improved inclusivity and accessibility in the Visitor Economy, fostering higher-quality visitor experiences.

Laying the Foundations for Long-Term Impact

The DDP has undertaken strategic activities to establish a foundation for long-term improvements in destination management, emphasising research, strategic planning, and workforce development. Initiatives like the Accommodation Study have identified disparities in quality and availability across the region, guiding investment strategies and attracting over 50 developers, with 16 projects already underway. Workforce development efforts, including the workforce and skills audit, collaboration with higher and further education institutions to shape curricula and developing a Tourism Centre of Excellence (a national and international tourism and hospitality training school and research facility), aim to address skills gaps and build a pipeline of talent to enhance service quality in the sector.³⁹

³⁹ In partnership with NECA, DCMS, DBT, and education and industry partners, the DDP is working to develop a Tourism Centre for Excellence. This Centre will create an education and training infrastructure for hospitality that aligns with market demands and industry needs, making the region more attractive to employers, job seekers, and school leavers. By capitalising on regional strengths and attracting international investment, such as from KSE, the Centre will establish

Objective 2: Increase public sector support and private sector investment

Public Sector Support

Through its advocacy and strategic initiatives, the DDP has elevated the profile of tourism, fostering collaboration among local authorities and aligning regional priorities. The DDP has strengthened the integration of the Visitor Economy into local strategies and plans, with stakeholders noting its influence on frameworks such as the North East’s devolution deal, where tourism and the Visitor Economy were formally recognised as priorities for regional growth.

By uniting the region’s seven local authorities, the DDP has facilitated a cohesive and strategic approach to embedding Visitor Economy considerations into local investment and planning decisions. This integration is evident in the DDP’s strategic outputs—most notably the development of the 10-Year North East Tourism Strategy and in the strengthened working practices and relationships cultivated during the pilot phase.

Private Sector Investment

The DDP has made a promising start in attracting private sector investment, particularly in addressing accommodation gaps and fostering infrastructure development. Key achievements include the Accommodation Study, which identified regional disparities and helped attract interest from over 50 developers, contributing to the development of 16 active hotel projects across the North East worth £162 million.

Objective 3: Increase involvement in local investment, planning and transport decisions

The pilot has strengthened the integration of Visitor Economy considerations into local investment and planning decisions, as discussed under Objective 2. This alignment is expected to lead to increased local investment and more coordinated planning efforts in the future.

Influence on Transport Decisions

Stakeholders noted the complexities of influencing transport investments, which often involve long lead times, significant funding, and coordination with national and regional authorities. Despite these challenges, the DDP has been acknowledged for advocating for the Visitor Economy and ensuring it is considered in regional decision-making processes, as reflected in its inclusion in the North East’s devolution deal, including transport.

Elsewhere, the North East DDP has made early strides in advocating for visitor-focused transport enhancements, laying a foundation for future improvements. Initiatives such as the Tourism Transport Connectivity Strategy and the development of a net-zero carbon active travel route along the NCN1 cycle route, supported by the expansion of a project offering fully funded e-chargers to

research and training partnerships and support the development of physical infrastructure, including hospitality schools or training hotels.

businesses, demonstrate the DDP's progress and commitment to addressing transport challenges within the Visitor Economy.

Objective 4: Increase support and delivery against national priorities

For a detailed assessment of the North East DDP's contributions to this objective, please refer to Chapter 6, which assesses the pilot's alignment with and contributions to the national priorities outlined in the UK Government's TRP and the recommendations of the de Bois Review of DMOs.

Objective 5: Attract and grow business events in the pilot DDP area

As noted in Section 3.2, the North East DDP faced challenges in attracting and growing business events, primarily due to initial delivery plans being centred around leveraging the anticipated development of the ICC SAGE Conference Centre, which has since been delayed with no confirmed opening date.⁴⁰ In response, the DDP refocussed on **creating a pipeline for the Conference Centre when it opens and by attracting conferences to other venues and developing its own events including HITS Expo 2024 and Destination 2034**, to ensure the region is well-prepared to capitalise on the facility once it becomes operational.

In addition to a number of notable early successes in facilitating events (Coach Tourism Association Conference, the HITS Expo 2024, and the Destination 2034 Conference, Nutrition Society Conference in July 2026), in June 2025, as a direct result of the DDP, Newcastle will be the first UK city to host X Design Week.

These efforts showcase the region's potential and demonstrate the long-term value and legacy of the DDP's contribution to business tourism. Furthermore, the DDP has laid the groundwork for a more strategic environment to support long-term growth in the business events sector. The development of the Regional Business Events Strategy has provided intelligence for targeting high-value events, including those expected to be hosted at the ICC in Gateshead. Additionally, the creation of the Ambassador Programme Toolkit has empowered local stakeholders to actively promote the North East as a destination for business events, fostering a network of advocates to attract and support future opportunities.

3.4 Strategic Added Value and Wider Impacts

The DDP's contributions to the wider Visitor Economy extend to fostering a more integrated, sustainable, and strategically coordinated approach to destination management. A summary of key themes from the consultations is presented below:

Increasing National and International Profile

Through its advocacy and promotional efforts, the DDP has raised the profile of the North East both nationally and internationally while taking steps to present the region as a cohesive package and unified destination. Stakeholders credited initiatives like the Travel Trade programme, and wider

⁴⁰ <https://www.bbc.co.uk/news/articles/cg57gy093v4o>

VisitBritain amplification work (see Section 5.2 and 3.1), with increasing awareness and interest in the region. Several businesses reported tangible benefits from these activities, including new partnerships, increased bookings, and heightened visibility in international markets. Most recently, the DDP secured funding from VisitBritain's Gateway Fund to work with transport partner, DFDS ferries, to run a campaign in Germany, targeting visitors travelling to the region via Amsterdam.

Additionally, the region's enhanced national profile has been reflected in leadership recognition, with Sarah Green, CEO of NGI, invited to join the Tourism Industry Council. This appointment underscores the influence and credibility established through the DDP pilot, further solidifying the North East's position within the national tourism landscape.

Strengthened Collaboration and Coordination

A recurring theme among stakeholders was the enhanced collaboration fostered by the DDP. By uniting local authorities, LVEPs, and other key stakeholders, the pilot has helped streamline efforts and reduce duplication across the region. This strategic coordination has provided a stronger platform for aligning regional and local strategies, with several stakeholders noting the DDP's role in developing a more cohesive and strategic Visitor Economy approach.

At a more local level, conversations during the North East Policy Sprint led to the launch of a pilot street food programme in Sunderland, which has since paved the way for the British Street Food Awards to be held in the region.

Capacity Building and Future Potential

The DDP has supported capacity building across the region, enabling stakeholders to better coordinate and manage destination management activities. Stakeholders highlighted the DDP's role in fostering leadership and providing a platform for exchanging best practices, both regionally and nationally. While some stakeholders noted limitations in the current phase, such as the need for stronger engagement with local authorities, the foundations laid by the DDP are expected to yield longer-term benefits.

Advancing Sustainable Tourism

The DDP has emphasised sustainability within the Visitor Economy, most notably through initiatives like the Regenerative Tourism Framework. Stakeholders praised the framework as a forward-thinking approach that has shaped local strategies and positioned the North East at the forefront in sustainable tourism thinking. However, it was also acknowledged that these efforts are still evolving, with further work needed to integrate sustainable practices across the Visitor Economy.

Addressing Skills Gaps and Workforce Development

The DDP has helped highlight and begin to address skills gaps within the Visitor Economy. Collaborative efforts with further education institutions and targeted skills audits have brought renewed attention to workforce challenges, particularly within the hospitality sector. Stakeholders noted early successes, such as partnerships with colleges to deliver tailored training curricula, but emphasised the need for sustained investment in workforce development to meet the sector's long-term needs. Additionally, the DDP's ability to bring stakeholders together led to the development of a mentoring scheme between the North East Hotels Association and the University of Sunderland, where 12 students are now receiving direct mentorship from hotel General Managers, further strengthening industry-academic partnerships and workforce development.

4. Contributions to National Objectives

The North East DDP pilot was developed in response to national-level priorities outlined in the UK Government’s Tourism Recovery Plan and the recommendations of the de Bois Review of DMOs. Both frameworks called for a more coordinated, impactful approach to tourism development, emphasising recovery, sustainability, inclusivity, and strategic collaboration.

Summary of Key Messages

- The DDP has demonstrated strong alignment with national objectives as outlined in the Tourism Recovery Plan and the de Bois Review. It has contributed to the recovery and strengthening of the NE’s Visitor Economy while laying a foundation for long-term growth through improved collaboration, strategic planning, and innovative approaches to destination management.
- By fostering collaboration across stakeholders, reducing silos, and aligning with national objectives outlined in the Tourism Recovery Plan and the de Bois Review, the DDP has advanced a more cohesive and coordinated approach to destination management. This has ensured a more equitable distribution of tourism benefits, contributed to the recovery and strengthening of the North East’s Visitor Economy, and laid a foundation for long-term growth through improved strategic planning and innovative initiatives.
- The DDP has driven innovation and strengthened strategic capabilities in the Visitor Economy by promoting digital technology adoption, leveraging data-driven insights, and delivering workforce development programmes, addressing immediate challenges while laying a foundation for long-term resilience and growth.

4.1 Contributions to the Tourism Recovery Plan

The UK Government’s TRP outlined a roadmap to aid the recovery of the tourism sector following the COVID-19 pandemic, focusing on rebuilding demand, fostering sustainability, enhancing inclusivity, and strengthening industry resilience. The North East DDP has aligned its activities with these priorities, delivering targeted interventions across key areas, as detailed in Chapter 4. Below is an assessment of how the DDP has contributed to each of the TRP aims:

Note: Please refer to Section 3.2 for a detailed assessment of the North East DDP’s contributions toward Aim 5: For the UK to be a leading European nation for hosting business events.

Aim 1: Recovery back to 2019 levels of tourism volume and visitor expenditure

According to STEAM data, visitor numbers and spend have shown significant recovery, demonstrating the region’s trajectory toward achieving pre-pandemic benchmarks:

- Visitor numbers in the region fell from 73 million in 2019 to 34.2 million in 2020, before rising to 69.1 million in 2023; and

- Similarly, visitor spending dropped from £4.8 billion in 2019 to £2.0 billion in 2020, recovering to £4.6 billion in 2023.

As discussed in Section 3.1, the DDP has directly supported this recovery and will continue to do so through key initiatives like Travel Trade engagements, international FAM trips, and VisitBritain's amplification efforts, which have raised and will continue to raise awareness among domestic and international audiences. Additionally, the DDP is laying the foundations for sustained growth in visitor numbers and spend. Key initiatives such as the 10-Year North East Tourism Strategy, the Accommodation Study, and the Regional Business Events Strategy aim to address key structural challenges, attract long-term investment, and ensure the region remains competitive in the medium- and long-term.

Aim 2: As tourism recovers and then exceeds 2019 levels, the government wants to see the benefits shared across every nation and region

The TRP emphasises the importance of ensuring year-on-year growth in visitor spending across all regions, extending visitor stays, improving off-season accommodation occupancy, and boosting domestic tourism to reduce the UK's tourism trade deficit. Key to achieving this is the development of well-connected transport networks, particularly for rural destinations.

- **Regional Collaboration and Strategic Vision:** The North East DDP's region-wide approach has been central to ensuring that recovery benefits are equitably shared across the NE. By fostering collaboration among local authorities, businesses, and stakeholders through initiatives like the 10-Year North East Tourism Strategy, the DDP has aligned regional tourism priorities and supported local-level growth, particularly in smaller or less-established destinations. Partnerships with LVEPs and targeted interventions have further ensured that all areas benefit from the Visitor Economy's contributions to recovery;
- **Addressing Regional Disparities:** The Visitor Economy's broad reach across the foundational economy—including hospitality, retail, and transport—has made it a critical tool for Levelling Up. By creating jobs, driving investment, and improving infrastructure, the DDP has not only contributed to immediate recovery but helped position the Visitor Economy as an enabler of inclusive growth;
- **Improving Off-Season and Rural Tourism:** Initiatives, such as the Accommodation Study, Travel Trade Resource Kit and wider amplification work, have sought to address gaps in seasonal and rural tourism. By promoting lesser-known destinations and working to improve off-season occupancy rates, the DDP is helping to spread economic benefits more evenly and ensure year-round economic activity in the region; and
- **Advocating for Transport Connectivity:** Recognising the need for well-connected infrastructure, particularly in rural and coastal areas, the DDP has emphasised transport as a key enabler of equitable tourism growth. This is exemplified by its advocacy efforts around the North East devolution deal, which integrates Visitor Economy priorities into broader regional infrastructure planning.

While early results indicate progress, longer-term efforts, such as the development of accommodation pipelines, enhanced transport links, and sustained collaboration between LVEPs and local authorities, will be critical to maintaining year-on-year growth. Through its focus on equity and inclusivity, the North East DDP is and can be a tool to drive inclusive growth.

Aim 3: To build back better with a more productive, innovative and resilient tourism industry.

The TRP identifies productivity, innovation, resilience, and the creation of quality, non-seasonal jobs as essential pillars for strengthening the tourism industry. To support the delivery of these objectives, the TRP highlights several key activity themes—digital innovation, skills development, sustainability, inclusivity, and support for the business events sector—with which the North East DDP has aligned its activities:

- **Digital Innovation** – the DDP has fostered digital innovation within the Visitor Economy by supporting the development of new technologies, such as Relic AI, and advancing technology adoption to empower businesses to expand their reach. By promoting advanced tools, like 360-degree virtual accessibility tours, the DDP has enhanced visitor planning while streamlining operations for businesses. Initiatives like New Adventures have further showcased the potential of digital platforms, making it easier for consumers to discover and book North East tourism experiences;
- **Leveraging Data** – to guide regional tourism development, the DDP has prioritised data-driven insights by funding and delivering key studies, including the Regenerative Tourism Framework, Accommodation Study, and Tourism Transport Connectivity Strategy. These outputs have provided stakeholders with actionable intelligence to refine policies and inform investment decisions. Furthermore, the DDP has played a role in collating and disseminating data, with initiatives like Quarterly Research Reports offering valuable insights. There remains, however, potential for the DDP to expand its role as a central data hub by integrating private data sources from visitor attractions (see Section 4.4 for further details);
- **Skills development** – the DDP has taken early steps towards addressing skills gaps within the Visitor Economy. Programmes such as the Proud Allies Training and the Everybody Welcome Campaign have enhanced inclusivity and workforce capabilities, enabling businesses to better align with current evolving market demands. Looking to future workforce needs, initiatives like the VR Careers Inspiration Toolkit, collaboration with local colleges to modify curricula and the Tourism Centre of Excellence have begun to position the Visitor Economy as an appealing and sustainable career pathway;
- **Sustainability** – for a detailed assessment of the DDP's contributions to sustainability in tourism, please refer to Aim 4 below;
- **Inclusivity** - for a detailed assessment of the DDP's contributions to fostering inclusivity, please refer to Aim 5 below; and
- **Business Events** - for an in-depth evaluation of the DDP's role in supporting business events, please refer to Objective 5 in Section 5.2.

Aim 4: A tourism industry that contributes to the enhancement and conservation of the UK's cultural, natural and historic heritage and minimises damage to the environment.

The pilot has meaningfully contributed to the conservation of the North East's cultural, natural, and historic assets by advocating for and embedding sustainable practices across the Visitor Economy.

A central initiative in these efforts has been the Regenerative Tourism Framework, which has provided a clear vision for positioning tourism as a tool to foster sustainable growth while preserving the region's rich heritage. Stakeholders highlighted the framework's influence in shaping local and regional policies, ensuring that tourism contributes positively to environmental conservation and supports long-term community well-being.

In addition to policy advocacy, the DDP has raised awareness of sustainability as a core principle within the Visitor Economy. Programmes such as Green Tourism Accreditation, combined with training and business support workshops, have equipped operators with practical tools and knowledge to integrate sustainable practices into their operations. These initiatives have driven a cultural shift within the sector, encouraging businesses to embrace environmental responsibility and align their activities with the broader goals of the TRP.

Aim 5: A tourism industry that provides an inclusive and accessible offer that is open to all.

By design, inclusivity and accessibility have been core focuses of the North East DDP, demonstrating its clear commitment to creating a Visitor Economy that prioritises equity and inclusivity. Key initiatives such as Proud Allies Training which 85 business attended, and AccessAble Guided Assessments have advanced these goals, 28 businesses achieving AccessAble certification.

Innovation has also been pivotal. The DDP has enabled 40 businesses to develop 360-degree virtual accessibility tours, empowering visitors with access needs to better plan their trips. Furthermore, the DDP provided 23 businesses with access to the WelcoME app, a platform offering real-time accessibility and inclusivity training, while over 300 Visitor Economy staff participated in inclusive language training to enhance equitable service delivery.

Other notable initiatives include the annual Purple Tuesday Events, which celebrated achievements in accessibility and raised awareness of inclusive practices, solidifying the DDP's role as a catalyst for inclusivity across the North East's Visitor Economy.

4.2 Contributions to the de Bois Review

The de Bois Review provided recommendations to reform DMOs across England. It called for a more streamlined, effective, and collaborative approach to destination management, emphasising governance, collaboration, sustainable funding, and the use of data and digital innovation to improve the Visitor Economy.

1. Establishing a Strong Regional Governance Framework

The de Bois Review emphasised the need for streamlined and robust governance structures to reduce fragmentation and align regional priorities. The North East DDP has taken significant steps in this area by:

- **Establishing a governance framework:** the DDP has laid the groundwork for a regional governance structure to foster collaboration within the Visitor Economy. While the current framework faced operational challenges, the experience has provided the foundations and valuable insights to inform the design and implementation of future governance structures (for more information see Section 5.4). These learnings will help ensure that future models are more effective in aligning priorities, coordinating regional efforts, and fostering a culture of collaboration;
- **Unifying stakeholders:** The DDP has succeeded in bringing together a diverse range of stakeholders, including local authorities, influential private sector actors, and national organisations such as DCMS, VB, and VE. These efforts have created an open forum for dialogue, raised awareness of the Visitor Economy as a driver of regional development, and promoted collaborative action to address shared challenges.
- **Enhancing strategic direction:** Initiatives such as the 10-Year North East Tourism Strategy provide a shared vision for the region, ensuring that decisions are aligned with broader regional and national objectives.

2. Addressing Fragmentation Through Collaboration

The de Bois Review identified fragmentation as a critical barrier to effective destination management. The North East DDP has worked to overcome this by:

- **Strengthening decision-making:** The DDP has facilitated a more coordinated approach to addressing challenges and opportunities within NE's Visitor Economy by creating opportunities for stakeholders—including seven local authorities and three LVEPs (NGI, County Durham, and Northumberland)—to engage in meaningful discussions. By bringing these groups together around a common framework supported by dedicated resources, the DDP has enabled stakeholders to work collectively on shared goals, co-deliver activities, and align efforts to avoid duplication. This approach has fostered stronger communication and partnerships both within and between local authorities, businesses, and tourism organisations.
- **Promoting equitable Visitor Economy activity:** The DDP has ensured that all seven local authorities in the region benefit from initiatives, including those without LVEPs. By extending the reach of its programmes and support mechanisms, the DDP has demonstrated a

commitment to inclusive and region-wide development, reducing disparities and enabling more consistent growth across the region.

- **Collaborative initiatives:** programmes such as Authentic Experiences Product Development Workshops and the development of the Regional Business Events Strategy illustrate the DDP's efforts to foster collaboration among local authorities, businesses, and national partners. These initiatives have enhanced the region's visibility and competitiveness but have also illustrated how a coordinated approach can amplify the impact of regional and national efforts.

3. Sustainable and Flexible Funding

Sustainable funding was a key recommendation of the de Bois Review, and the North East DDP has made progress by:

- **Advocating for regional priorities:** the DDP has helped position the Visitor Economy as an important pillar in regional development and funding discussions. Its advocacy efforts contributed to ensuring the integration of the Visitor Economy into the North East devolution deal, solidifying its importance within the region's broader economic strategy.
- **Securing strategic investment:** the DDP has effectively leveraged resources from VB, such as the wider North East amplification campaign and funding for strategic initiatives to deliver impactful projects including:
 - **Gateway Campaign:** £150k was secured from VisitBritain to create a £400k marketing fund targeting German and Dutch visitors. This campaign will generate demand and strengthen the case for further investment in ferry services from DFDS.
 - **Expedia Campaign:** The DDP partnered with Expedia, aligning with a £500k campaign by VisitBritain. The campaign targets French visitors to stimulate demand for the Paris route, which serves one of the region's top 5 inbound markets.
- **Encouraging private sector buy-in:** through initiatives such as the Ambassador Programme, the DDP has leveraged wider resources to support the delivery of its objectives, particularly in raising awareness of the North East offer. Additionally, the DDP has facilitated the creation of new bookable products and services by supporting businesses in leveraging private sector resources and match funding. These efforts have strengthened regional buy-in, showcased the benefits of collaboration, and enhanced the North East's tourism offer, contributing to economic growth.

4. Strengthening Destination Management Capabilities

The North East DDP has aligned with the de Bois Review's call to enhance DMOs' strategic capabilities through initiatives such as:

- **Data-driven insights:** the DDP has funded and delivered several research projects and strategic tools, including the Regenerative Tourism Framework, Accommodation Study, Tourism Transport Connectivity Strategy and other intelligence reports, which have provided valuable insights to inform regional policy, refine tourism offerings, and respond proactively to emerging consumer trends.

- **Skills development:** the DDP has made contributions to workforce development, by seeking to tackle both immediate needs and laying the groundwork for a future-ready talent pipeline. Programmes such as Proud Allies Training and the Everybody Welcome Campaign have improved workforce skills and inclusivity, equipping businesses to deliver a more inclusive and sustainable tourism offer. These efforts have sought to position the North East as a more appealing destination for conscientious travellers while ensuring the current workforce is better prepared to navigate the dynamic demands of the sector.

Simultaneously, initiatives like the VR Careers Inspiration Project and early-stage discussions around a Tourism Centre of Excellence have focused on inspiring the next generation and addressing long-term skills gaps. By promoting career opportunities and creating pathways for young people to enter the Visitor Economy, the DDP is helping to future-proof the sector and secure its long-term resilience and competitiveness.

5. Raising Regional and National Profiles

In line with the de Bois Review's emphasis on enhancing the marketing of England's destinations, the North East DDP has actively worked to elevate the North East's profile through targeted initiatives:

- **Creating a unified identity and brand:** recognising the fragmented identity of the North East as a barrier to competitiveness, the DDP has focused aligned stakeholders around shared priorities and reframing the North East tourism offer under a single cohesive narrative. Early achievements, such as establishing the DNEE website, have provided a platform for marketing the region nationally and internationally. Building on this, the 10-Year North East Tourism Strategy charts a path forward to strengthen the region's brand, align priorities, and position the North East as a competitive and recognisable destination, driving long-term growth in the Visitor Economy.
- **Driving domestic and international awareness:** the DDP has leveraged initiatives like international FAM trips, travel trade, and collaborations with VisitBritain to increase the visibility of the North East's offerings among domestic and global audiences. These efforts have resulted in tangible outcomes, such as new partnerships and bookings, showcasing the region's potential to international markets.

5. Process Review

This section of the report provides findings from a detailed process review of the design, implementation, delivery, management and governance of the DDP pilot. That is, to examine for each aspect how it was delivered, what worked well and areas for improvement.

5.1 Designing the DDP

Summary of Key Messages

- By using strategies such as policy sprints and developing an evidence base before the launch of the pilot, the North East DDP pilot effectively aligned diverse regional interests, which was crucial for setting a solid foundation for the programme's design and implementation phases.
- The North East DDP's delivery priorities were regarded as relevant and aligned with regional and national strategic priorities, while its adaptability to post-pandemic tourism trends was considered a strength; however, some stakeholders highlighted missed opportunities in business consultation and sectoral representation, such as cultural venues, which could have further strengthened its impact.
- The dual short- and long-term focus of the pilot influenced its design to deliver immediate outcomes which did not always fully align with the broader strategic ambitions of the DDP – a challenge exacerbated by the size of funding and shortened delivery timescales.
- Despite the constraints of a compressed timeframe, the North East DDP effectively utilised its initial year for strategic planning and design, which was important for building stakeholder relationships, shaping the priorities and actions for the subsequent delivery years.
- Transitioning from output-specific to outcome-focused delivery plans after the initial planning phase significantly enhanced the North East DDP's adaptability and responsiveness to evolving regional needs and seize opportunities. This flexibility enabled the DDP to deliver some of the pilot's most notable successes, such as the Regenerative Tourism Framework.
- Despite restrictions on direct marketing, the adjustment to allow travel trade activities enabled the North East DDP pilot to amplify its supply-side initiatives, enhance its impact, and achieve short-term growth objectives within the Visitor Economy while furthering its long-term strategic goals.

Policy Sprint and Bid

In March 2022, NGI was requested by the DCMS and VB to support the Inter-Ministerial Group on the Visitor Economy to understand how the sector could support the Levelling Up agenda. NGI organised a policy sprint,⁴¹ bringing together over 40 stakeholders from regional and national levels, including government bodies, industry experts, and tourism professionals. The objective was to devise strategies to maximise the potential of the Visitor Economy in the North East and support

⁴¹ A policy sprint is a workshop that brings together policymakers, experts, and stakeholders to collaboratively develop and refine potential policy solutions to specific challenges

regional development. To enable informed discussions, NGI developed a comprehensive evidence base that detailed the current state of the North East Visitor Economy, highlighting its strengths, weaknesses, and critical gaps. There was a consensus among stakeholders of the importance of the sprint and evidence base in establishing a strong foundation for the DDP in the NE:

- **Regional Understanding:** enhancing understanding of regional capabilities and needs, facilitating targeted and effective strategies to leverage the area's potential;
- **Framework for Collaboration:** aligning the diverse interests and resources of key stakeholders and encouraging cooperative efforts;
- **Strategic Alignment:** a step towards developing a unified regional strategy that moved from individual efforts to a cohesive, coordinated approach; and
- **Funding Bid Success:** informing the successful funding bid for the DDP, aligning closely with the goals of the TRP and other governmental initiatives.

Lesson Learnt: The policy sprint underscored the necessity of thorough preparatory work and comprehensive data to inform strategic initiatives and provide a structured collaborative framework to align diverse regional interests. It is recommended that similar future initiatives prioritise early and broad stakeholder engagement and invest in building and maintaining comprehensive data resources to guide decision-making processes.

Originally, discussions about the DDP between DCMS and the three LVEPs were focused on targeting interventions within the three LVEP geographies. However, there was a collective insistence on expanding the programme to cover all seven North East local authorities, ensuring that the DDP aligned with the region's full potential and fostered a truly cohesive regional strategy.

Designing a Pilot to Deliver Against its Objectives

One of the rationales for the DDP pilot was to tackle structural issues within the Visitor Economy through long-term strategic interventions and investments. While the headline objective was to achieve 6% annual growth during the pilot period, a stimulated impact goal was set to double the size of the Visitor Economy over the next decade. A few stakeholders noted that the dual focus influenced the programme's design and delivery in targeting immediate objectives which may not have fully aligned with or drew resources from the broader strategic ambitions of the DDP. In other words, the challenge of achieving an appropriate balance between securing quick wins in the period of the pilot whilst also laying the foundation for addressing structural issues that would bear fruit over a longer period of time.

Stakeholders commented that the programme's objectives, grant size and shortened delivery timescales had made it more difficult for the programme to achieve tangible, impactful outcomes within such a short period. Additionally, the time lag in the availability of data to assess change has further presented challenges in evaluating the pilot's ability to achieve tangible outcomes.

Lesson Learnt: The DDP experience has reinforced the importance of aligning programme objectives with funding structures and timelines in shaping programme design, delivery and impact. For interventions with both short- and long-term targets this alignment is important to ensure that immediate objectives support and do not conflict with overarching ambitions. In addition, adequate

resources and careful planning are crucial to address both current and future demands of the Visitor Economy effectively.

Stakeholders considered the DDP's delivery themes relevant and well aligned with objectives of the TRP and the de Bois Review, as well as the region's needs as reflected in its LVEP Destination Management Plans. There were comments that the DDP plans also adapted well to changing tourism trends in the post-pandemic era, prioritising value for money, sustainability, and authenticity in its initiatives. However, some stakeholders noted missed opportunities, particularly regarding the consultation of smaller local businesses during the programme's design phase, which contributed to mixed outcomes in the delivery of business support activities. Additionally, there was feedback suggesting that certain sectors, such as cultural venues, were underrepresented within the DDP delivery framework, leading to perceptions that more integrated efforts could have strengthened the pilot's overall impact. In hindsight, a longer design phase might have allowed for more thorough consultation.

Delivery Structure and Strategy

The North East DDP adopted a phased delivery approach, with the first year dedicated to design, research, and strategic planning. This initial phase was important for setting a robust strategic foundation, enabling the DDP to identify best practice from elsewhere to shape its priorities and design activities for the duration of the pilot period. Several stakeholders considered this approach as appropriate and effective, particularly for establishing stakeholder relationships and shaping a pilot that aligned with regional needs.

As part of the GFA, the North East DDP was initially required to submit detailed delivery plans that outlined specific outputs under each TRP delivery themes for DCMS approval ahead of each delivery year. This requirement was perceived by some stakeholders as lacking flexibility, particularly in terms of planning for long-term objectives and responding to changing delivery contexts and emerging opportunities. Recognising these constraints, DCMS and VB agreed to a modification ahead of Years 2 and 3, allowing the North East DDP to draft plans that were outcomes focussed rather than predefined outputs.

This adjustment was considered important not only for building on the strategic foundations established in Year 1 but also for incorporating the necessary flexibility and adaptability into the pilot's structure. This flexibility proved essential in adjusting priorities and actions across the delivery years, which subsequently led to some of the DDP's successes, which were not part of initial plans, including for example the Regenerative Tourism Framework (for more information see Chapter 4).

Lesson Learnt: The North East DDP's experience underscores the value of incorporating an initial strategic planning phase in regional development programmes. This foundational phase should allow for flexibility and adaptability in programme design, enabling the alignment of evolving regional needs with strategic objectives. Such an approach facilitates the ability to capitalise on unforeseen opportunities, leading to significant achievements beyond the initial scope.

The design of the DDP pilot was aimed at addressing long-term supply-side structural issues within the Visitor Economy through strategic interventions and investments in skills and infrastructure.

The pilot was not permitted to deliver direct marketing efforts, aligning with the focus to correct more fundamental market failures rather than providing short-term and temporary uplift or return on investment.

As the delivery of the pilot progressed, several stakeholders highlighted the increasing case to integrate marketing efforts, particularly in the later stages, to fully leverage, amplify, and sustain the benefits of the supply-side improvements made by the DDP activities. For example, while the DDP created new products, such as packaging local assets including cycling and walking trails for international audiences, the inability to market was noted as a barrier. The change to allow the DDP to allocate funding towards travel trade was highlighted by several stakeholders as a necessary development, effectively bridging the gap between restrictions on direct marketing and the need to amplify activities but enabling the DDP to achieve its short-term objectives for growth within the Visitor Economy.

Lesson Learnt: there is value in DDPs incorporating demand-side strategies to amplify and build upon supply-side initiatives without compromising but in the pursuit of long-term strategic objectives.

5.2 Marketing the DDP and its Activities

Summary of Key Messages

- The creation of the Destination North East England (DNEE) brand and website was a critical milestone, achieving high engagement and establishing a unified platform to promote the region's diverse assets.
- The delivery team deployed a number of traditional (leverage sector bodies and newsletters) and innovative initiatives (podcasts and SIC based identification) to engage Visitor Economy organisations outside existing networks and not previously engaged with sector bodies.
- Despite early challenges, with buy-in and time taken to build strong relations, the North East DDP pilot fostered regional collaboration and alignment through persistent stakeholder engagement, with initiatives like the dedicated communications group and one-day DDP workshop proving effective. Efforts were well-received but highlighted the need for early relationship-building, consistent communication, and direct interaction to enhance coordination and impact.
- The North East DDP pilot were effective in raising the NE's national and international profile through strategic travel trade engagement, influencer campaigns, and amplified coverage by VE.

The North East DDP adopted a comprehensive approach to marketing and communications, which, in line with its focus on long term structural interventions, was primarily aimed at supporting industry engagement, improving the pilot's national profile, and encouraging stakeholder collaboration, rather than delivering direct marketing efforts, which are discussed below.

Engaging Industry

The North East DDP pilot adopted a range of communication channels and marketing strategies to engage businesses, organisations, and individuals within the Visitor Economy - including social media, newsletters, webinars, podcasts and its partners networks including the LVEPs and other public and sector bodies such as Chamber of Commerce, Tourism Alliance, UK hospitality and regional partners and sector bodies including North East Hotels Association, Food and Drink North East, NE1, Newcastle Gateshead Cultural Venues, Tourism Alliance, UK Hospitality. While its evolution required time and coordination to build momentum, there was a consensus that, once established, the approach was of quality and thorough albeit with some challenges:

- **Sustaining Engagement Over Time:** declining participation and engagement in some activities, such as webinars and newsletters, were noted as the pilot progressed.
- **Short Delivery Window and Overlapping Activities:** the compressed delivery timescale created challenges for sequencing activities, often requiring multiple opportunities to be marketed simultaneously. Some stakeholders felt this reduced clarity and uptake.

It is important to also note that the success of the DDP was supported by three LVEP's existing network and infrastructure, which enabled more effective implementation.

The DDP was responsive to stakeholder's initial concerns regarding the geographic distribution and relevance of projects and industry engagement across the region. This led to the DPP increasing efforts and diverting resources, in some cases directly engaging businesses across the region by cold calling to improve take up of activities.

A significant turning point was the development and launch of the DNEE brand in February 2024 and the Travel Trade website in September 2024. The delivery team noted that the website achieved higher than expected traffic and strong activity sign-ups. The unified North East DDP brand was particularly valued as a platform to showcase the region's diverse assets and activities, promoting a consistent and collaborative approach to marketing the region as a whole. Additionally, the establishment in 2024 of a dedicated communications group with representatives across the delivery partners proved effective in expediting actions, improving the coordination of messaging, and enhancing DDP coverage across the region during the latter stages of the pilot.

Lesson Learnt: Effective industry engagement requires a well-coordinated, multifaceted communication strategy that leverages regional collaboration. The North East DDP highlighted the value of creating a unified regional brand and establishing a platform for coordinated efforts among partners. Sustaining engagement over time necessitates adapting outreach strategies, addressing geographic disparities, and employing innovative tools to broaden reach, maintain stakeholder interest, and amplify the programme's overall impact.

One of the aims of the DDP was to engage as many industry organisations as possible within the region, particularly those outside existing networks and not previously engaged with sector bodies. Alongside established communication channels, the DDP adopted innovative approaches such as podcasts and weekly online webinars. A notable dissemination strategy involved using online web scraping and SIC-based identification to target smaller hospitality businesses across the region. This approach enabled the distribution of a pocket guide, which provided information about the DDP, available opportunities, and QR codes directing recipients to resources, toolkits, and further opportunities. Between September and October 2025, a total of 2,500 pocket guides were distributed, and by mid-December 2024, DDP monitoring data recorded over 1,946 scans of the QR codes, highlighting the effectiveness of this targeted engagement strategy.

Lesson Learnt: the Visitor Economy is both large and broad in definition and therefore engaging previously unconnected organisations requires a combination of innovative and targeted outreach strategies. Initiatives, such as leveraging sector bodies, podcasts, webinars and more innovative ones such as SIC-based identification to disseminate QR-enabled pocket guides to broaden engagement and ensuring that hard-to-reach businesses are included in regional initiatives.

Stakeholder Engagement

The North East DDP prioritised engaging delivery and strategic stakeholders through a variety of communication channels, including newsletters, meetings, and an open-door policy adopted by NGI. Stakeholders acknowledged the usefulness of these channels, particularly newsletters, as effective tools for keeping them informed. However, opportunities to directly engage NGI through meetings or calls were particularly valued, though these were at times challenging to coordinate due to the pilot's short delivery timescales and delivery team's capacity constraints.

Consultations revealed that while many stakeholders were familiar with specific initiatives or activities, they lacked a broader understanding of the pilot's full scope. This limited their ability to engage more proactively and raise awareness within their networks. It is important to note that many stakeholders were managing their own pressures and time constraints, which they recognised impacted their ability to engage at the level they would have liked to, rather than solely being a reflection of DDP's stakeholder engagement. Building relationships and securing buy-in from partners and sector bodies took time to establish which is common to pilot initiatives. Capacity constraints among some local authorities, particularly those without established LVEPs, further limited their ability to engage fully or consistently distribute communications. The establishment of a dedicated communications group, a one-day session involving all LVEPs and partners was particularly valued, fostering collaboration, alignment, and a stronger sense of regional cohesion.

As the pilot matured, significant progress was made in engaging partners, although opportunities remain to better engage and leverage sector bodies' networks. This includes for example working through structures such as the North East Culture Partnership which has produced 'Case for Culture', a framework for the development and growth of the region's arts and heritage sectors from 2015 to 2020. The growth and sustainability of the arts, culture and heritage is intrinsically linked to the ability of the North East to compete to attract visitors. Whilst the partnership has been represented at and engaged with several of the activities, forums and events delivered through the pilot, there is scope to strengthen links and alignment between the Case for Culture framework and the 10-year Tourism Strategy launched through the pilot. This can ensure that the needs of this sector and the contribution to provides across the region are considered and recognised within relevant policy and strategy areas including transport, skills, inclusive economic growth, health and the environment.

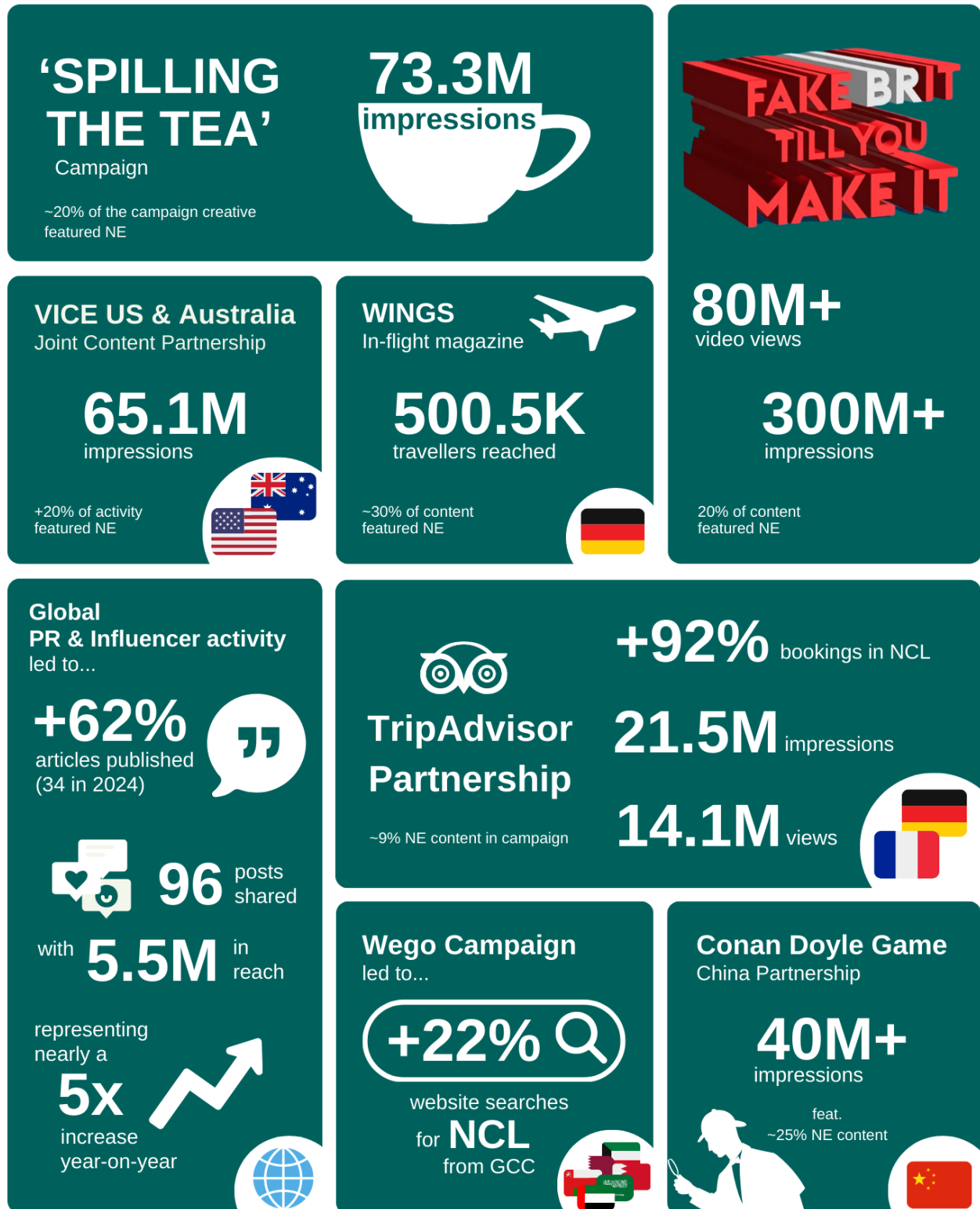
Lesson Learnt: Early investment in relationship-building and securing partner buy-in is critical to ensure coordination, clarity, and widespread participation. Addressing capacity constraints and creating structured opportunities for collaboration, such as dedicated workshops or communications groups, can help overcome initial challenges, foster alignment, and enhance overall programme impact.

Raising National and International Profile

Although the DDP was unable to utilise its funding for consumer marketing, the pilot recognised the value of raising awareness of its activities and the region both domestically and internationally. This focus aimed to not only amplify the impact of DDP initiatives but also support the achievement of its broader objectives. Among the various approaches adopted, stakeholders most commended the DDP's travel trade activities, as discussed in Chapter 4, and the amplification efforts by VB.

VisitBritain's positioning of the North East as a focal point in their communications, an unprecedented level of coverage for the region, was particularly valued. Other activities, such as influencer campaigns, further elevated the region's visibility and were widely regarded by

stakeholders as highly effective in raising the North East's national and international profile and growing the Visitor Economy. VisitBritain analysis found for the 2023-24 financial year:



5.3 Delivering the DDP

Summary of Key Messages

- Compressed delivery timelines for Years 1 and 2 created financial and operational challenges, placing pressure on stakeholders and affecting engagement and sign-ups for some initiatives.
- While NGI's expertise and networks helped overcome initial hurdles, stakeholders noted missed opportunities to expand collaboration across the LVEP partnership. Effective examples, such as leveraging partner skills leadership, demonstrated the value of optimising resources, but these efforts could have been further developed.
- NGI's leadership role was critical for maintaining momentum and navigating capacity constraints among partners. However, some stakeholders felt this limited input from other LVEPs, highlighting the need for clearer structures and processes to enhance collaborative decision-making and balance contributions.
- The pilot leveraged existing relationships with delivery partners effectively, but additional time and efforts to engage new voices could have broadened perspectives, enhanced outreach, and increased inclusivity.
- Limited follow-up after events and activities hindered the pilot's ability to sustain momentum and maximise long-term impact.

Activities were delivered directly by NGI, in collaboration with other LVEP partners, as outlined in the annual Delivery Plan. Depending on the nature of the activity, delivery responsibilities varied: some initiatives were implemented by NGI and partner LVEPs, others involved supporting activities developed by the LVEP partners, while certain activities were commissioned to external delivery partners to leverage specialist expertise and resources.

Delivery Timescales and Resourcing

Delay to the pilot's initiation compressed delivery timelines for Year 1 (constituting the period Dec 2023 – Mar 2023) and Year 2 (Jul 2023 – March 2024), required the North East DDP to spend a 12-month budget within four and eight months, respectively. Stakeholders highlighted that these constraints created financial management and delivery challenges, limiting the pilot's ability to make the desired progress against its objectives. Some also noted that the urgency of delivery and activities being delivered concurrently due to the compressed timeframe placed additional pressure on stakeholders and may have impacted engagement and sign-ups for certain initiatives.

Initial resource and staffing limitations during the pilot's set up period were another challenge. Furthermore, additional activities and opportunities (such as FAM trips and Influencer campaigns) initiated by DCMS and VB, while valuable and supportive of the DDP's objectives, were not accounted for in the Delivery Plans and further stretched the already limited resources of the delivery team. These constraints were gradually alleviated as additional resources were leveraged. Stakeholders commended NGI's ability to overcome these initial hurdles, citing its extensive track record, established networks, and capacity to coordinate complex programmes. However, some

stakeholders noted a lack of activity or follow-up after events and activities, which it was suggested may limit the ability to sustain momentum and maximise the long-term impact of these initiatives.

Lesson Learnt: Effective delivery of regional programmes like the DDP requires early and adequate resource planning, with clear mechanisms to stagger activities and align budgets with realistic delivery timelines. Leveraging expertise and fostering deeper collaboration across partnerships, as demonstrated in specific areas, can help optimise limited resources and strengthen programme outcomes.

Leveraging Networks and Relationships

The North East DDP's delivery approach leaned on the existing and extensive networks and relationships held by NGI and its partners. Stakeholders largely agreed that these networks were critical to ensuring the pilot's rapid rollout and addressing the capacity constraints faced in the early stages. NGI's strong track record and established relationships were seen as key enablers of the pilot's ability to deliver complex initiatives within compressed timescales.

However, views on the reliance on existing networks were mixed. Some stakeholders considered it a pragmatic and efficient way to deliver activities and reach as many participants as possible within the available timeframe. Others expressed concerns that this approach limited opportunities to engage with new voices and bring fresh perspectives to the pilot within the delivery timeframe.

Lesson Learnt: Leveraging established networks is vital for ensuring efficient delivery within resource and time constraints. However, regional initiatives should aim to balance this reliance by actively reaching out to new stakeholders and fostering more inclusive engagement to diversify perspectives and maximise programme impact

Working in Partnership

The DDP partnership structure has provided a solid foundation for regional collaboration and has helped make progress in strengthening partnership working. Stakeholders recognised NGI's role as the lead delivery partner as important for delivering the DDP's objectives, maintaining momentum within compressed timescales, and navigating capacity constraints among partners. However, some felt that NGI's central role, particularly in overseeing project approvals and resource distribution, potentially limited input from the two other LVEPs. This created challenges for these partners, as they sometimes found it difficult to align their own activities with the DDP, affecting buy-in. The tension between the need for centralised oversight and the need for greater autonomy highlights the importance of better dovetailing DDP and LVEP activities, both strategically and operationally.

Lesson Learnt: The feedback underscored the importance of establishing clearer structures and processes—such as Memoranda of Understanding between partners—to support collaborative decision-making and ensure meaningful contributions from all partners.

Several stakeholders expressed a desire for better utilisation of expertise across the LVEP partnership. While NGI's strength in communications and FE institutions' leadership in skills development were seen as successful, some felt that a more strategic allocation of responsibilities could have enhanced the pilot's impact.

5.4 Managing and Governing the DDP

Summary of Key Messages

- NGI's responsiveness and adaptability were pivotal in managing the North East DDP, but greater documentation and clearer role dissemination are needed to address vulnerabilities caused by reliance on a small core team.
- The pilot's diverse working groups fostered collaboration and buy-in but faced challenges with delayed agendas, limited decision-making influence, and the balance between inclusivity and efficient delivery due to the size of the groups.
- While the governance framework provided appropriate structures for decision-making, irregular meetings, inconsistent attendance, and its position as an agenda item to the Local Authority Chief Executives' meetings limited its effectiveness.
- The Board was comprised of public sector representatives, but several stakeholders noted broader representation to include private-sector Visitor Economy organisations would have helped enhance strategic insights, responsiveness to industry needs, and the delivery of key initiatives.
- The absence of an integrated monitoring framework and oversight mechanisms hindered data consistency and reporting, limiting the ability to assess the North East DDP's long-term outcomes and broader impact.

The governance structure of the North East DDP was designed to ensure effective oversight, coordination, and delivery of its programme of activities. At its core, the DDP Board comprised the Chief Executives of all seven local authorities in the region, providing high-level strategic oversight and accountability. The Board reported directly to the Local Authority Chief Executives' meetings, integrating the DDP's agenda into broader regional priorities.

Beneath the Board, thematic Working Groups were established to provide operational input and drive the delivery of specific focus areas such as skills and regenerative tourism. These groups included a diverse mix of stakeholders, including LVEP representatives, ports, and airports, ensuring a range of expertise and perspectives informed pilot activities. Working Groups met regularly, typically monthly or bi-monthly, and played a key role in fostering collaboration and sharing information across partners.

5.4.1 Managing the DDP

The management of the North East DDP was led by NGI, whose responsiveness and ability to adapt to changing demands given the compressed timescales and ambitious objectives were widely recognised by stakeholders. However, stakeholders highlighted a reliance on a small core team within NGI, creating vulnerabilities in programme management and transition. Documentation of delivery strategies and clearer dissemination of roles and responsibilities were identified as areas requiring improvement, with stakeholders emphasising the need for robust transition and training plans to ensure programme continuity and accountability.

Lesson Learnt: Clear documentation of delivery strategies and defined roles and responsibilities are critical to ensuring effective programme management and continuity. Reliance on a small core

team, while beneficial for agility, can create vulnerabilities. Robust transition and training plans should be prioritised to mitigate risks and sustain programme accountability during leadership or structural changes.

5.4.2 Working Groups

The programme's working groups were widely praised for fostering collaboration and facilitating the exchange of information among partners. Stakeholders valued the open forum format, which brought together diverse voices and encouraged transparent communication, enabling local leaders and representatives to share insights and align efforts across the partnership.

Despite these strengths, some stakeholders noted that the time required to gather input from the diverse membership occasionally slowed delivery; however, this was largely seen as a worthwhile trade-off for generating buy-in and enabling meaningful discussions.

Some stakeholders raised concerns about limited influence in decision-making processes, with decisions often being made centrally by NGI before being presented to the working groups, leaving little room for critical feedback or adjustments. A key factor that hindered stakeholders' ability to contribute meaningfully was capacity constraints within their organisations, leading to inconsistent or sporadic attendance at meetings. Additionally, one stakeholder mentioned that late scheduling of meetings and agendas further impacted the ability to provide timely input and contribute effectively to programme design and decision-making.

Lesson Learnt: Diverse working groups are valuable for fostering collaboration and generating buy-in, but effective decision-making requires a balance between inclusivity and efficiency. To optimise engagement, securing consistent engagement, ensuring timely scheduling, clear agendas, and sufficient opportunities for stakeholder input are essential. Avoiding overly centralised decision-making and promoting earlier and more structured and consistent involvement can strengthen collaboration and programme outcomes.

5.4.3 Governance

The governance framework for the DDP was widely regarded as having an appropriate design, with structures and systems to support decision-making and programme oversight. However, stakeholders noted that the framework took time to embed and faced challenges in implementation, particularly around engagement and the clarity of roles and responsibilities.

The Board's integration into the Local Authority Chief Executives' meetings sought to align the DDP's agenda with broader regional priorities. However, these meetings were not consistently held or attended by all representatives, and discussions about the DDP often received limited time. When discussed, the focus was frequently retrospective, which some stakeholders felt constrained the strategic scrutiny needed to assist the pilot in delivering its objective and shape its long-term direction. However, stakeholders did recognise that the establishment of the NECA presents an opportunity for strengthening governance moving forward, providing a more formalised vehicle for aligning DDP activities with regional priorities and ensuring sustained strategic oversight.

Several stakeholders also highlighted the need for broader representation on the DDP board, including greater involvement from private-sector Visitor Economy organisations. This inclusion

would not only provide enhanced strategic insights but also ensure a more nuanced understanding of the sector's needs. Stakeholders suggested that a private-sector representative could help the pilot be more responsive to industry demands while serving as an influential advocate to drive engagement and enhance the delivery of key initiatives.

Lesson Learnt: A well-designed governance framework is essential for aligning programme objectives with broader regional priorities, but its effectiveness depends on clear roles, consistent engagement, and balanced representation. Establishing formal agreements, such as Memoranda of Understanding, can help clarify roles and responsibilities, ensuring consistent participation and fostering accountability among all stakeholders.

5.4.4 Monitoring the DDP and its Activities

The absence of a monitoring framework at the outset of the North East DDP posed significant challenges. Compressed timescales and the rapid pace of delivery required NGI to prioritise implementation over the design of a comprehensive monitoring system. In-house processes were employed to track activities, but the lack of central integration and oversight affected data consistency and quality, necessitating additional resources late into the pilot to develop a system for capturing and assessing delivery and beneficiary data.

Stakeholders had mixed views on communication regarding the pilot's progress and outcomes. While many felt that communication was effective and cited various mediums, such as quarterly newsletters, others struggled to grasp the full scope of the DDP's work. While updates on key achievements were provided, such as through quarterly newsletters, the volume and breadth of activities undertaken by the DDP meant that not all initiatives were captured in these communications. Furthermore, the relevance of certain updates varied depending on the stakeholder's role and focus, and the time constraints faced by many stakeholders often limited their ability to engage fully with all the information provided.

The absence of a robust, centralised monitoring framework at the outset made it more difficult to track and assess the full extent of progress. Delayed and fragmented data-sharing restricted knowledge exchange, leaving some stakeholders uncertain about the DDP's performance against targets. While outputs, such as partnership activities and the employment of specific roles, were evident, insufficient reporting on long-term outcomes constrained the ability to assess, showcase, and champion the pilot's successes.

Lesson Learnt: Establishing a robust and proportionate monitoring framework at the outset of regional initiatives is critical to ensure consistent data collection, effective oversight, and clear reporting on progress and outcomes. Compressed timescales and fast delivery can challenge this, but centralised and integrated systems, coupled with strong oversight mechanisms, are essential to demonstrate impact, inform decision-making, and build stakeholder trust.

6. Activities Delivered by the DDP

This chapter provides an overview of the activities delivered under the North East Destination Development Partnership pilot, showcasing the breadth and ambition of its pilot.

Summary of Key Messages

- The diverse and ambitious portfolio of activities was considered appropriate, relevant, and aligned with national and regional priorities, effectively addressing the challenges and opportunities of the NE's Visitor Economy and laying a foundation for long-term initiatives like the Tourism Centre of Excellence, Regenerative Tourism Framework and 10-Year North East Tourism Strategy.
- Since February 2023, the North East DDP has delivered 109 activities, including events, research outputs, and partnerships and engaged just under 1,450 individuals, businesses or organisations linked to the Visitor Economy, of which supported just over 1,150.
- The DDP successfully introduced destination management activities and tourism focussed interventions to areas of the North East that had not previously benefited from such initiatives.
- The geographic distribution of DDP activities, with 80% benefiting the North East as a whole, reflects the pilot's aim to serve the entire region, alongside its targeted and conscientious efforts to address gaps and underrepresentation in areas identified by the working groups and board.
- Concerns were raised about the uneven distribution of DDP activities, with some regions being underrepresented; this distribution reflects varying levels of capacity, engagement, and business presence across local authorities, while the pilot aimed for equitable engagement, it also focused on high-potential areas to support growth, which may have contributed to the concentration of resources in certain regions.
- The focus on tourism infrastructure is well-placed and the DDP has made progressive strides by delivering informative research and laying the groundwork for future developments but continued follow-up and implementation are essential to maximise these efforts.
- Stakeholders regarded the pilot's initiatives in developing and enhancing tourism products as a key success. Pairing these efforts with visibility and engagement activities was seen as important to increase awareness and maximise their reach and impact.
- While the pilot's efforts in addressing skills gaps took time to solidify, its persistence and patient approach has led to meaningful progress. Collaboration with key education institutions to shape curricula to address skills gaps and laying the groundwork for a possible Tourism Centre of Excellence were seen as significant steps forward.
- The DDP's focus on inclusivity, accessibility, and sustainability was appropriate and aligned with market demands. However, stakeholders emphasised the importance of ensuring consistent engagement across all businesses to effect regional cultural change.

- While the DDP's focus on event management work has not been able to progress as much as desired or planned, particularly due to the delayed development of the conference centre, its focus on strategic planning (such as the Regional Business Events Strategy) has helped lay the groundwork for a more coordinated and sustainable framework.
- The DDP has raised the national and international profile of the North East by shaping a more cohesive regional narrative and fostering valuable connections through impactful initiatives such as Travel Trade missions and FAM trips.
- Through its advocacy efforts and strategic engagement, the DDP has unified the NE's representation, elevated the Visitor Economy's profile, and secured its relevance across policy areas, positioning tourism as a key driver of regional economic and social development.

Since February 2023, the North East DDP has delivered 109 activities, including events, research outputs, partnership, while engaging 1,399 and supporting 1,098, individuals, businesses and organisations linked with the Visitor Economy. Of these, 87% benefited from low-intensity support, 10% from medium-intensity support, and 3% from high-intensity support.⁴²

Distribution of Activities Delivered and Organisations Engaged

Stakeholders praised the DDP for introducing LVEP-led activities and tourism-based interventions to areas of the North East that had not previously benefited from such initiatives, particularly local authorities not covered by a LVEP. Stakeholders noted that a more tailored approach to activities could have better addressed the varying needs of urban, rural, and coastal areas and businesses, recognising the diversity of the region.

Analysis of the geographic distribution of DDP activities and beneficiary engagement demonstrates the pilot's targeted efforts and concerns regarding the under-representation of certain regions in terms of activities and support. While 80% of the 109 activities delivered were region-wide or benefited the entire NE, the 37 business support activities were more concentrated, with 51% of these being region-wide. This indicates that, while the pilot aimed to serve the region comprehensively, business support efforts were more focused. It is important to note in this context, that several stakeholders across the region have highlighted that certain initiatives, such as the accommodation study, would not have been possible without the support of the DDP.

When breaking down beneficiary engagement and support by local authority, the data in Table 4.1 revealed some variation. Regions like Newcastle upon Tyne and Northumberland had higher levels of engagement and support, while areas such as Sunderland, South Tyneside, and Gateshead showed lower percentages.

⁴² Where low, medium and high level of support are defined as six or fewer hours, six to 12 and 12 or more hours respectively. It should be noted, the presented data does not capture organisations that have benefitted from multiple low level support projects or programmes and the cumulative effect of this. Case studies in this report have been used to demonstrate the effect of organisations that have received more than one type of support.

Table 4.1: Geographic Distribution of Beneficiaries Engaged and Supported

Location	Engaged (n=900)	Supported (n=737)
County Durham	16%	15%
Gateshead	8%	8%
Newcastle upon Tyne	33%	33%
Northumberland	28%	29%
North Tyneside	8%	8%
South Tyneside	2%	2%
Sunderland	6%	6%

Source: Wavehill Analysis of DDP Data, 2024

This distribution reflects a number of factors, including varying levels of capacity and engagement within different local authorities, the number of businesses in each area and their willingness to engage but also a tension in the pilot's design: balancing the need for equitable distribution of resources across the region with the requirement to focus on areas or assets that are better positioned for immediate growth. In the short term, prioritising high-potential areas for investment may be necessary to deliver growth objectives but this approach can sometimes result in an uneven distribution of resources. To ensure sustainable, enduring growth across the region, it is important to establish a long term destination management plan that phases investment and activity over time, allowing for a balanced approach that drives both immediate results and prepares other regions for future success.

This distribution reflects a number of factors, including varying levels of capacity and engagement within different local authorities, the number of businesses in each area, and their willingness to engage. It also highlights a tension in the pilot's design: balancing the need for equitable distribution of resources across the region with the requirement to focus on areas or assets that are better positioned for immediate growth. In the short term, prioritising high-potential areas for investment may be necessary to deliver the growth DCMS and HM Treasury expect, but this approach can sometimes result in an uneven distribution of resources. To ensure sustainable, long-term growth across the region, it is crucial to establish a 10-year destination management plan that phases investment and activity over time, allowing for a balanced approach that drives both immediate results and prepares other regions for future success.

Stakeholders acknowledged the DDP's targeted and conscientious efforts to address gaps and underrepresentation in regions identified by the working groups and board. While the pilot offered both online (14) and in-person (31) events, which helped facilitate engagement across the large region, smaller and harder-to-reach businesses, particularly those outside established networks, were less engaged.

Portfolio of Activities Delivered

The breadth and ambition of the DDP's portfolio were widely acknowledged by stakeholders, with the pilot delivering a diverse range of activities across key thematic areas and sectors. These included skills development, travel trade initiatives, accessibility improvements, and regenerative tourism frameworks, among others. Stakeholders generally felt the portfolio aligned with national

and regional priorities and sought to address the challenges and opportunities of the NE's Visitor Economy.

Feedback highlighted both the successes and challenges in delivering such a broad range of activities. Stakeholders close to the programme emphasised the importance of experimentation during the pilot phase, which allowed for innovation and learning. While many activities were praised, such as travel trade initiatives that enhanced the region's international visibility, others, such as the community platform and business support programmes, were perceived as less effective due to limited engagement or applicability across the diverse needs of the region.

The pilot's compressed timeline, while challenging, served as a catalyst for innovation and valuable learnings. By enabling the DDP to quickly implement and test a variety of ideas, the pilot fostered innovation and assessed different approaches—key objectives for any pilot. While this proactive approach sometimes stretched resources and meant that certain thematic areas, such as skills and marketing, required more focused effort, it ultimately maximised learning opportunities.

Despite these challenges, the portfolio's success in fostering collaboration, increasing regional awareness, and laying the groundwork for longer-term initiatives, such as the business case and possible development of a Tourism Centre of Excellence in the North East and regenerative tourism strategies, was widely commended. Stakeholders emphasised the importance of building on these achievements and narrowing focus in future iterations to drive deeper impact in key areas.

Lesson Learnt: A diverse and ambitious portfolio can drive innovation and learning during a pilot phase. However, future programmes should narrow their focus on key thematic areas to optimise resource allocation and maximise impact, ensuring alignment with strategic priorities and regional needs, within afforded delivery timescales.

The following section provides a summary of the activities delivered by the DDP under its key thematic areas, highlighting their contribution to the pilot's objectives and the broader Visitor Economy. Each thematic activity is presented with a brief overview of the outputs delivered, supported by stakeholder perspectives on their relevance, impact, and areas for improvement.

6.1 Tourism Infrastructure

The DDP pilot identified tourism infrastructure as both a critical weakness and a significant opportunity for enhancing the North East's capacity and appeal as a visitor destination. A lack of cohesive infrastructure, characterised by insufficient accommodation capacity, quality, and limited transport connectivity, was highlighted as a key barrier to fully capitalising on the region's cultural, natural, and historical assets. In response, the DDP focused on evidence-based research and strategy development to address these gaps and support future investment.

Research efforts, such as the **Accommodation Study** and the continued publication of **annual tourism data (STEAM)**, has provided insights into regional needs and opportunities for policymakers to guide future investment. Similarly, the **Campervan Strategy** (piloted in Northumberland) and **Tourism Transport Connectivity Strategy** (in Durham) offered actionable solutions to improve visitor mobility while supporting sustainable travel options – both were pilots and are planned to be rolled out regionally.

Complementing this research, the DDP pilot supported the development of major tourism infrastructure projects. Initiatives such as the **Feasibility Study for a Tourism Centre for Excellence** aimed to create hubs for skills development and innovation within the Visitor Economy.

A key priority for the DDP pilot is to work with the international gateways in the NE, Port of Tyne and Newcastle Airport, to attract new routes into the region. The **Norwegian Ferry Policy Sprint** has helped to restart ferry connections between Bergen and the Port of Tyne, enhancing international connectivity and attracting more international visitors. Similarly, the DDP has worked with Newcastle Airport to increase international inbound tourism, facilitating visitors through its Gulf Cooperation Council (GCC) and European influencer and FAM activities. The DDP also hosted events that welcomed Saudi and European visitors, further strengthening the region's international appeal. Additionally, the DDP contributed to the successful business case for a new route to Copenhagen and the return of EasyJet's Amsterdam service. This was supported through provision of data to inform the business case, collaboration on an Expedia campaign to demonstrate route viability, and hosting of 14 Nordic travel journalists to showcase the region to the Nordic markets. In addition to this, wider travel trade work such as familiarisation trips and media visits with travel trade and travel media, attendance at travel trade conferences and exhibitions helped to stimulate interest and supported airline engagement.

Additionally, the DDP participated in key tourism events, including the HITS Expo and Coach Tourism Association Annual Conference, to enhance the region's international visibility and strengthen business connections. However, to capitalise on these new routes, there is a clear opportunity to integrate transport options and collaborate with tour operators to create holiday packages that promote the region's full range of attractions. This will encourage visitors to book longer stays, ensuring they explore the North East, rather than using the region as a gateway to other destinations.

The DDP funded an extension to the NECA active travel project, providing fully funded off-grid, zero-carbon e-chargers developed by a local Northumberland business, Intelligen, to businesses along the NCN1 cycle route. This expansion, from Seaham in Durham to Berwick in

Northumberland, supports sustainable tourism by enabling longer e-bike journeys and enhancing the region's eco-friendly travel options.

Stakeholder perspectives

Stakeholders widely recognised the DDP's focus on infrastructure development as a necessary step in addressing regional challenges, with initiatives like the Accommodation Study praised for laying important groundwork. However, they highlighted the need to expand the remit to include key visitor attractions, at-risk venues such as those in the night-time economy, and region-wide developments to ensure benefits are felt across rural, coastal, and urban areas.

The focus on sustainability, particularly through the **Regenerative Tourism Framework**, was widely recognised as a key differentiator for the North East. Stakeholders identified opportunities to further embed sustainable practices across infrastructure projects, positioning the region as a leader in sustainable tourism and enhancing its appeal to environmentally conscious visitors.

For capital projects, particularly those related to transport, stakeholders acknowledged the need for longer timescales to achieve meaningful progress. Concerns were also raised about the lack of follow-up actions linked to research outputs, such as Tourism Transport Connectivity Strategy, with calls for a long-term strategy to sustain, monitor, and build upon the DDP's efforts, ensuring ongoing collaboration with national bodies like VE.

6.2 Business and Workforce Development

The DDP pilot identified that workforce development and business support were central to strengthening the NE's Visitor Economy. Persistent skills gaps, both in the current workforce and in future pipelines, limited the region's ability to meet evolving sector demands. Additionally, fragmented efforts to enhance business support and tourism product development, combined with a lack of cohesive regional offerings, posed significant barriers to growth and competitiveness. In response, the DDP undertook a wide-ranging programme of activities targeting skills development, workforce engagement, and tourism product innovation.

Strategy Development and Research

To address long-standing workforce challenges, the DDP prioritised research and strategic engagement. Key initiatives included the **Workforce and Skills Audit** and **State of the Nation Report**, which identified workforce needs and opportunities for skills provision, and the **Workforce Development Strategy Engagement** sessions, which brought together businesses and education providers to set strategic priorities. The **Destined for more Careers Handbook** and **VR Careers Inspiration Toolkit** were launched to inspire young talent to consider careers in hospitality and tourism, addressing recruitment challenges.

Case Study: VR Careers Inspiration Toolkit

The Newcastle United Foundation collaborated with the North East DDP to develop and implement VR Careers Inspiration videos, using virtual reality to showcase career opportunities in the tourism and hospitality sector.

Working with the DDP, the Foundation facilitated the distribution of VR headsets, with some remaining on-site and others made accessible across the region. The DDP provided coordination and project management support, enabling the involvement of six businesses and overseeing the production of a filming project. The Foundation also engaged with schools and youth groups to introduce the VR experience, with plans for broader implementation in the following year.

Additionally, the Foundation noted the potential benefits of increased awareness of other available activities and expressed interest in opportunities to engage with other initiatives and activities.

Business and Workforce Support

Programmes such as the **Street Food Accreditation Project** and the **Visitor Ready Scheme** equipped businesses with new tools, certifications, and best practices to enhance their operations and align with industry standards. The **North East Tourism Awards** and **Masterclasses** celebrated excellence and innovation, further strengthening regional capacity and collaboration while promoting the North East as a destination of choice. The **New Adventures** platform, funded by the North of Tyne Combined Authority, and expanded via the DDP, aggregates diverse experiences and activities from the region's tourist offer into a single platform to simplify promotion and bookings for businesses.

Case Study: The Maldron Hotel

The Maldron Hotel Newcastle has benefited from initiatives led by the DDP, with a strong focus on inclusivity, accessibility, and sustainability. A highlight of these efforts was the hotel's participation in the Tourism Awards Masterclass, which culminated in a shortlist for a sustainability award. This recognition motivated the team to further enhance environmentally friendly practices, aligning with the region's Regenerative Visitor Economy Framework and its 10-year strategy for sustainable tourism.

Other achievements included adopting the Welcome App through the Everybody Welcome project, training staff to support guests with disabilities, and creating a 3D film showcasing accessibility features. Additionally, Proud Allies training improved LGBTQIA+ inclusivity, fostering a welcoming environment for all guests and staff members alike. As one of the stakeholders described:

"The Proud Allies training enhanced the awareness and understanding of 100 strong member team to know how to better respect the LGBTQIA+. It helped deepen our understanding and awareness and respect of one another, deepening the inclusivity within the team"

Through its involvement in DDP-led initiatives, the Maldron Hotel improved operations, enhanced its reputation, and positioned itself as a leader in sustainable hospitality while contributing to regional economic growth.

A strong emphasis was placed on fostering inclusivity, accessibility, and sustainability across the sector. Initiatives such as the **Proud Allies Training** has promoted diversity and supported businesses in creating more welcoming environments for all visitors. Programmes like the **"Everybody Welcome" webinars** (funded by the NECA and DNEE), **Purple Tuesday Events**, and **AccessAble Guided Assessments** provided businesses with actionable guidance on improving accessibility standards. Sustainability was also a key focus, with initiatives such as the **Green Tourism Accreditation Scheme** helping businesses achieve certifications that align with environmentally conscious practices. These efforts sought to position the region as an inclusive and sustainable tourist location, enhancing its appeal to a broader and more conscientious audience.

Case Study: Laverock Law Holiday Cottages

Laverock Law Holiday Cottages - a small nature-focused business based in Berwick-upon-Tweed offering family adventures, guided - walking tours and other well-being-oriented experiences, collaborated with DNEE to achieve Green Tourism Accreditation, enhancing their sustainability credentials and attracting eco-conscious visitors. This has helped boosted their profile, aligning them with the growing demand for environmentally responsible travel experiences and creating long-term growth opportunities.

Participation in regional tourism initiatives provided valuable networking opportunities, fostering connections with other local businesses and offering insights into regional strategies. The focus on regenerative tourism and sustainability was particularly well-received, enabling the business to

align its practices with broader industry goals. The business also appreciated the platform for communication, collaboration, and networking.

Case study: Hooked-On Group

Hooked-On Group, a restaurant management company in the North East overseeing Blackfriars, Dobson & Parnell, and Hinnies, became involved with DNEE through their existing partnership with NGI.

Through their participation in initiatives such as the Everybody Welcome project, Proud Allies training, New Adventures, and hosting FAM trips, Hooked-On Group elevated its profile and formed valuable partnerships. One of the key benefits has been the networking and cross-regional collaborations, such as their partnership with the Auckland Project, which has helped bring together wider regions, moving beyond just Newcastle and Gateshead, to bring together art, history, and culture to promote the region's heritage and support local economic and social development.

"The impact of these changes would've been a lot slower without the support and funding from DDP, and some projects, like the micro-brewery at Blackfriars, wouldn't have been possible without the funding."

These initiatives have driven significant positive change for Hooked-On Group, including increased sales, greater accessibility, and a stronger customer base. Their Green Tourism accreditation has improved sustainability, reducing waste and energy consumption while generating cost savings. The group's continued focus on accessibility has improved customer service, ensuring all visitors feel welcomed. Looking ahead, the group anticipates sustained growth, with increased visibility and further cross-regional collaborations, continuing to strengthen regional tourism.

Research, Development, and Roll-Out of Tourism Products and Services

To support the growth of innovative tourism products, the DDP pilot implemented a range of initiatives aimed at raising the region's profile among both domestic and international visitors while equipping businesses with tools to create engaging, visitor-ready experiences.

A key mechanism for this has been the travel trade initiatives, such as the **Travel Trade Resource Kit** and **Travel Trade Forums**, which helped businesses navigate and engage with intermediaries such as tour operators and travel agents to broaden their reach. Programmes like the **Authentic Experiences Product Development Workshops** and **Unmissable North East Maker workshops** were important in helping businesses develop new bookable experiences that showcased the region's unique offering – with the former, having helped support the development of 26 new experiences.

Case Study: Raby Estates

Raby Estates, a prominent and expanding visitor destination in County Durham, has actively engaged in several DDP-supported activities, such as the Travel Trade Forum, Travel Trade Website Content development, and the Becoming Travel Trade Ready Workshop.

These initiatives have been helpful in connecting Raby Estates to a wider network of industry contacts, enhancing their visibility within the travel trade market. They emphasised that the networking opportunities, like attending events such as the Britain and Ireland Marketplace Networking Event and the Coach Tourism Association Conference Fam Trip, have enabled Raby Estates to position themselves as a more attractive destination and explore potential avenues for corporate events. The partnership has also helped amplify their PR and marketing reach, with the DDP assisting in promoting Raby Estates' latest products, such as their high-end garden remodel and Plotters' Forest.

"Raby Estates has started to make contact with heritage assets in County Durham, and that wouldn't have perhaps happened as quickly without the DDP."

While the DDP has provided a valuable platform for Raby Estates to showcase their developments and leverage regional tourism contacts, they also noted that there is room for broader engagement beyond Newcastle. Raby Estates aspires to host DDP workshops and integrate more strategic opportunities for corporate business, underscoring the need to expand the focus to encompass the wider region.

Inclusivity and accessibility were also embedded in this work, with initiatives like the **Welcome App** offering businesses a platform to improve visitor engagement by tailoring services for individuals with access requirements. The **3D filming initiative** further supported businesses by providing high-quality interactive videos that showcased the accessibility features of their premises, helping visitors better understand amenities and plan their visits with confidence. These combined efforts not only positioned the North East as a more inclusive and accessible destination but also strengthened its reputation as a leader in providing high-quality, innovative tourism products.

Case Study: Durham University Oriental Museum

The Oriental Museum at Durham University used 3D filming support offered by the DDP pilot to improve its accessibility and marketing efforts. The museum, which hosts approximately 30,000 visitors annually, serves a diverse audience, including special schools, day centres for adults with accessibility needs, and independent visitors with additional requirements.

Upon learning about the opportunity through an email from the DDP, the museum saw the potential of the technology to address longstanding challenges such as limited parking and to prepare visitors more effectively for their trips. The 3D scan included not only the museum interior but also the car park, offering a preview for prospective visitors. The museum has since integrated the tool into its outreach activities, using it as a portable marketing asset during presentations at community centres and a model for improving accessibility across other university venues.

The museum's experience with the 3D filming process was overwhelmingly positive, citing the professionalism and efficiency of the team. Clear guidance notes provided ahead of time ensured smooth preparation, and the scan itself was delivered quickly with opportunities for detailed feedback. This tool has already become a core part of the museum's strategy, helping reduce barriers for visitors with additional needs by eliminating uncertainties. It has also sparked interest within the university to adopt similar technology for other sites. In the long term, the museum anticipates broader impacts, including increased visitor numbers and heightened local and regional awareness. This initiative aligns with wider efforts to make the NE's heritage offerings more inclusive and accessible, contributing to the region's reputation as a welcoming and forward-thinking destination.

"Impacts on accessibility are really strong – we work with a lot of people with additional access requirements, and this helps us be inclusive in tackling some of the issues we have. The more information visitors have in advance, the more prepared they are – no surprises when they arrive... Whenever I go on outreach, I use it every day as a marketing tool to raise awareness of the museum."

Case study: The Fire Station

The Fire Station, a prominent live music and performance venue in Sunderland, has seen significant benefits from its engagement with DNEE. Their participation in initiatives such as the Everybody Welcome Project and 3D filming has focused on improving accessibility, supporting their accessibility accreditation and improving the visitor experience. The 3D filming, which showcased the venue's commitment to inclusivity, not only boosted accessibility but also increased visibility, generating positive PR and attracting new clientele, resulting in higher footfall and revenue.

"It really suits us [3D filming] because we invited our top 20 bookers to an event not too long ago and it turns out that 8 of them have access requirements, so for us access is not only just the right thing to do, but is also actually commercially really important as it's such a high portion of our demographic that are benefitting from that...we're now working towards getting an access accreditation, and a core ambition of ours is to get the Bronze Award."

The Fire Station's involvement in the Street Food Project has been particularly successful, generating £30,000 in additional revenue. By hosting this pilot project and creating 14 new street food vendors to support peak capacity, the venue opened up a new revenue stream and diversified its offerings. This success spurred the Fire Station to invest in a street food vehicle and launch the 'Fireside pop-up' venture, further expanding their business and entering a new regional industry.

Looking ahead, The Fire Station expects continued growth through ongoing DNEE participation. Hosting the national Street Food Awards will strengthen their market position and benefit the regional Visitor Economy. By facilitating their entry into the street food market through knowledge sharing, DNEE's support has driven growth and created a lasting impact on the local economy and industry.

Stakeholder Perspectives

The DDP's efforts in product development were considered by stakeholders as a notable success. These initiatives, when complemented by the visibility and engagement activities outlined in Section 4.3, represented a strong combination of supply-side and demand-side efforts, helping to elevate the region's profile while fostering innovative tourism products.

Stakeholders highlighted the ongoing challenge of creating cohesive regional offers and the lack of holiday packages or experiences that showcase the NE's unique attractions together and address seasonal demand fluctuations. Many noted the importance of creating stronger partnerships and shared strategies to capitalise on the region's strengths and enhance its competitiveness.

Initiatives like the Green Tourism Accreditation Scheme, which supported 48 businesses, were applauded for aligning business practices with evolving market expectations, particularly among environmentally conscious visitors. Stakeholders encouraged deeper integration of sustainability principles into business support and product development efforts, recognising this as a significant opportunity to differentiate the North East from competing destinations.

Stakeholders recognised the cultural and operational change driven by inclusivity and accessibility-focused initiatives such as the "Everybody Welcome" webinars and Proud Allies Training. However, they emphasised the importance of ensuring consistent engagement across all types of businesses, particularly those in rural areas, to maximise their impact and ensure the benefits of these initiatives are felt throughout the region.

While many of the DDP's initiatives were well-received, stakeholders noted the importance of consistent and meaningful engagement with the sector. Certain programmes, such as the Community App, a B2B engagement platform, were identified as having underperformed due to limited uptake and engagement from businesses. This was attributed in part to insufficient early communication and sector buy-in during the initial design phases of the pilot (see Section 5.1).

Lesson Learnt: Stakeholders emphasised the need for more outreach and consultation mechanisms to ensure that future initiatives are designed and implemented in ways that resonate with the diverse needs of the region's businesses and encourage greater participation.

Persistent challenges in addressing skills gaps, both in the current workforce and in future talent pipelines, were highlighted as a key concern. Stakeholders underscored the need for a more coordinated, ambitious, and sustained strategy to tackle these issues. Programmes such as the **VR Careers Inspiration Project** and **Hospitality Talent and Attraction Guide** were praised for their innovative approaches to inspiring young talent and addressing recruitment barriers. However, questions about their long-term effectiveness remain. Stakeholders noted that efforts to shape the curriculum at four regional universities and further education colleges to lay the foundation for a **Tourism Centre of Excellence** were seen as a step in the right direction, with the DDP accelerating conversations at both regional and national levels.

6.3 Promotion Preparation and Event Management and Delivery

The DDP pilot recognised that strategic promotion and event management were central to enhancing the North East's visibility and competitiveness as a destination for both leisure and business tourism. The pilot has delivered a range of initiatives designed to raise the region's profile in domestic and international markets while developing a cohesive regional strategy for tourism and event promotion.

Strategy Development and Research

The DDP placed significant emphasis on evidence-based planning to optimise event management and promotion. The **Pipeline Development for SAGE ICC initiative** created a prioritised list of potential business events for the new conference centre, supporting the region's ambitions to become a hub for international conferences. Similarly, the development of a **Regional Business Events Strategy** provided intelligence to developing a coordinated approach to attracting and managing events. Additionally, the forthcoming **Event Organisers Handbook on Sustainability** will equip event organisers with tools to host environmentally friendly events, aligning with broader sustainability goals.

Visibility and Strategic Engagement Initiatives

To enhance the North East's profile in international markets, the DDP facilitated several **Travel Trade, Media, and Influencer Engagement** initiatives. Programmes such as the **Britain and Ireland Marketplace Fam Trip** and the **VisitBritain Spain Travel Trade Fam Trip** brought international media, travel trade professionals, and influencers to the region, showcasing its attractions and networking opportunities with local businesses. Influencers from key target markets, including Germany, China, and the Gulf Cooperation Council, created content highlighting their experiences, which was shared with extensive follower bases, amplifying the region's visibility in international markets. The **Discover Destination North East England Workshop** and **VisitBritain Spain Showcase Event** further demonstrated the DDP's success in fostering direct engagement, resulting in tangible outcomes such as a significant group visit of 125 international tourists. Most recently, in January 2025 alone, the DDP hosted 40 tour operators from India, Italy, and the US.

Case Study: The Maldron Hotel Newcastle

The Maldron Hotel Newcastle has greatly benefited from the Destination North East England's initiatives, especially through familiarisation and press trips. These activities, part of a broader effort to drive Travel Trade activity, connected the hotel with 320 tour operators and travel agents. As a result, the hotel gained increased international visibility, attracting attention from over 300 international buyers and influencers, many of whom were visiting the region for the first time.

Through the DDP's focus on driving Travel Trade activity, the Maldron Hotel has successfully enhanced its operations, contributed to the local economy, and improved its international presence in the competitive tourism sector.

Additionally, the DDP hosted webinars targeting international markets, such as the **Sell North East to America, Germany, and Sweden series**, to present the region's offerings to VisitBritain's travel trade officers.

Conferences and Events

The DDP has helped attract and hosted several high-profile events that have reinforced the NE's position as a destination for events hosting. The **Coach Tourism Association Annual Conference** marked its debut in the region, drawing over 200 delegates to the Hilton hotel in Gateshead. This event featured a **Meet the Buyer session** with 860 networking appointments and familiarisation trips to key attractions, including the Auckland Project and Bamburgh Castle. Similarly, the **Discover Destination North East England Workshop**, held at St James' Park, facilitated collaboration between 30 international tour operators and travel agents and 25 local businesses through one-on-one appointments, fostering partnerships and boosting future bookings.

The **Destination 2034 Conference** convened over 380 stakeholders to discuss the region's 10-year Visitor Economy strategy (for more information, see Section 4.4), laying the foundation for sustainable growth.

Stakeholder Perspectives

The DDP's progress within this key thematic area was influenced by external dependencies, notably the anticipated development of the new ICC Sage Conference Centre during the pilot phase. While this limited the DDP's ability to directly generate new bookings and events, it has helped lay the groundwork for a more strategic environment to support future growth.

The development of the Regional Business Events Strategy was highlighted as an important step toward establishing a coordinated approach to event management and promotion. Stakeholders identified the need for a more integrated framework encompassing transport, accommodation, and security as an area for future focus – which the accommodation study has helped tackle. This would enable the region to better manage overlapping demands and fully harness the economic and tourism potential of major events, such as high-profile concerts and conferences.

The DDP was also credited with making strong progress in marketing the North East offer, playing a pivotal role in shaping a cohesive narrative for the region that others such as destination organisations and VB could amplify. The delivery of amplification activities, including visits from tourism ministers, influencer trips, and Travel Trade engagements, were seen as a key success, effectively leveraging opportunities to raise the region's profile.

Stakeholders also praised the DDP's international visibility initiatives, such as the VisitBritain Spain Fam Trip, Britain and Ireland Marketplace, and Sell North East to America, Germany, and Sweden webinars, for effectively showcasing the region's offerings and fostering connections with international buyers. However, some stakeholders suggested that greater coordination, including timing, between influencer campaigns, media engagements and trade initiatives would deliver greater and sustained impact in international markets.

6.4 Policy Design and Governance

The DDP pilot underscored the importance of robust policy design and governance structures in ensuring the North East's Visitor Economy is well-positioned for long-term growth. By prioritising strategy development, fostering partnerships, and engaging in advocacy, the DDP sought to establish a foundation that aligns regional efforts and maximises the impact of tourism initiatives at the local, regional and national level.

Strategy Development and Research to Support Destination Management

Through research, including the development of the Regenerative Tourism Framework and a unified 10-year North East Tourism Strategy, the DDP has shaped policy and strategy discussions, creating a cohesive foundation for aligning regional efforts, addressing fragmentation and driving growth.

Case Study: Regenerative Tourism Framework

The Regenerative Tourism Framework, created in partnership with the Global Destination Sustainability Movement, and with input from stakeholders across sectors, set goals for embedding regenerative tourism principles into the North East's strategies, emphasising sustainability, social impact, and long-term viability. It focuses on five key pathways: decarbonisation, thriving local businesses, inclusive employment, improved infrastructure, and restoration of nature and culture.

By uniting LVEPs, local authorities, and other regional organisations, the framework facilitates collaboration to create a cohesive strategy for the region's tourism development. The framework's principles are designed to guide action, ensuring that tourism growth benefits both visitors and local communities while safeguarding the region's unique assets.

Notably, the framework has influenced national policy discussions, including influencing VisitEngland's approach to sustainable tourism.

DDP's subscription to **Data Appeal**, an advanced destination intelligence platform, provided valuable insights into visitor sentiment, booking trends, and accommodation demand, will equip decision-makers with data to inform policy and investment decisions. It has been utilised by Newcastle United Football Club and Newcastle Airport, with the latter using the insights to attract an airliner, leading to the introduction of a new direct route between Copenhagen and Newcastle for summer 2025

Forming Partnerships, Advocacy, and Lobbying

Visits from prominent figures, including **Sir Chris Bryant MP, Minister for Creative Industries, Arts, and Tourism, and Fiona Pollard and Lady Victoria Borwick, Chair and Advisory Board Chair of VisitEngland**, respectively, underscored the pilot's efforts to secure national support and elevate the profile of local tourism initiatives. These engagements highlighted the region's strategic priorities and demonstrate its growing importance within the UK's Visitor Economy.

More widely, the DDP has established itself as a key advocate for the North East Visitor Economy, ensuring that tourism is interconnected with other sectors. Through its lobbying efforts, the DDP has secured representation in discussions with organisations such as **NECA** and the **Department for Transport**. This advocacy has been instrumental in integrating the Visitor Economy into the broader economic and strategic planning for the region. Notably, the North East's 10-year Tourism Strategy has ensured that tourism is recognised as a key growth sector, forming a core part of the devolution deal and one of the seven portfolios, focusing on culture and the Visitor Economy. This integration highlights the cross-cutting nature of the Visitor Economy, ensuring that tourism is not only a standalone sector but also interwoven into broader regional strategies, reinforcing its role in driving sustainable economic growth across various industries.

Ongoing memberships in organisations, such as **UK Inbound** and the **European Tourism Association**, help strengthen the region's connections to global best practices and opportunities for collaboration. These memberships support staff development by improving their understanding of trade routes to market and global travel trends. Furthermore, by engaging with these key intermediaries, the DDP enhances its credibility with tour operators and signals that the region is open to, and capable of, welcoming international trade.

Initiatives like the **DMO Stakeholder Event** and **Evaluation Report** has and will help facilitate knowledge exchange and alignment across the region, ensuring a more coordinated and impactful approach to destination management.

Stakeholder Perspectives

The DDP was commended for representing the North East as a unified entity, marking a significant step change in how the region's Visitor Economy was represented and perceived. The pilot's efforts in advocacy and securing representation in key discussions ensured that the Visitor Economy gained relevance across a range of policy areas and sectors. This strategic shift not only elevated the profile of the North East but also underscored tourism's critical role in driving regional economic and social development.

The Regenerative Tourism Framework was widely recognised for its forward-thinking approach, offering the potential to differentiate the North East and position the region at the forefront of sustainable tourism. Stakeholders commended its ambitious vision and alignment with evolving global trends in tourism management. However, some stakeholders emphasised the need for clearer guidance on translating the framework into actionable steps, particularly at the local authority level, to ensure its practical implementation and maximise its impact. Stakeholders also stressed the importance of maintaining momentum and ensuring the framework does not lose traction, highlighting the need for sustained efforts to drive its progress and embed its principles into future strategies.

One suggested area for improvement, given its unique position, was for the DDP to strengthen its role as a central hub for data collection and dissemination. While its Quarterly Research Reports provided valuable insights, there remains an opportunity to consolidate private data held by visitor attractions. Stakeholders noted that access to this broader data could better inform targeted strategies and enhance decision-making across the sector, fostering a more cohesive and data-driven approach to regional tourism management.

7. The North East Development Partnership's Next Steps

As part of the evaluation, stakeholders were consulted on the future of the North East DDP pilot, focusing on its structure, activities, and strategic approaches. This chapter highlights key themes emerging from these discussions, reflecting both the achievements of the pilot phase and the opportunities and challenges for its continuation.

Summary of Key Messages

- The North East DDP pilot has fostered greater collaboration and created a unified regional identity, helping to position the North East as a cohesive and competitive tourism destination.
- Stakeholders highlighted the need for follow-on funding and a long-term strategic vision to sustain and scale the pilot's early successes.
- Opportunities exist to align the DDP's work with NECA's governance structure, leveraging the new mayoral role to champion the Visitor Economy and attract investment.
- Future efforts should focus on embedding tourism as a cross-cutting theme in regional growth strategies, with a focus on sustainability, equitable benefits across local authorities, and strategic event planning.

The North East DDP has created a strong platform for collaboration and strategic planning, positioning the Visitor Economy as a vital component of the region's growth. However, the pilot's short duration and limited scope underline the need for sustained funding, clearer strategic direction, and alignment with regional governance structures like NECA. By addressing these challenges and building on the DDP's achievements, stakeholders believe the North East has the potential to fully realise the Visitor Economy's role in driving regional prosperity and cohesion.

Building on the Pilot's Achievements

Stakeholders agreed that the pilot has laid a strong foundation for the future but acknowledged that a three-year pilot cannot create strong legacy without sustained follow-on funding. One of the pilot's primary successes has been fostering collaboration and creating a structure that brings together a diverse range of stakeholders from the Visitor Economy, regeneration, and tourism sectors. This has facilitated a start of a shift in perspective, with businesses increasingly seeing themselves as part of a regional ecosystem rather than operating in silos.

The DDP has also made early progress towards developing a unified regional identity, emphasising the North East's cultural, natural, and historical assets. This groundwork has been important in presenting the region as a cohesive and attractive tourism destination, though stakeholders noted that much work remains to solidify this vision and promote the region's brand.

Strategic Opportunities

Looking forward, stakeholders highlighted the significant role that NECA could play in shaping the future of the DDP. The creation of NECA offers an opportunity to establish a unified governance

structure and a figurehead to champion the Visitor Economy nationally and internationally. By building on the DDP's work, NECA could facilitate greater collaboration among local authorities, reduce duplication of efforts, and ensure that benefits and opportunities are shared equitably across the seven local authorities. However, as noted throughout the DDP pilot, achieving growth often requires a balance between equitable distribution of resources and focusing on areas or assets best suited to support development. This consideration will be important as NECA works to support the Visitor Economy's long-term growth across the entire region.

Stakeholders also emphasised the importance of embedding tourism in the region's broader economic development strategies and policies. This involves positioning tourism not only as an economic driver but also as a tool for connecting communities, supporting local businesses, and preserving cultural heritage. Strategic initiatives such as improving transport connectivity and fostering sustainable practices were highlighted as key areas for future focus.

Challenges and Considerations

Despite its successes, stakeholders expressed concerns about the short duration of the pilot, noting that three years is insufficient to establish a lasting legacy. Many also felt that the DDP's strategic vision needs further refinement to ensure its long-term relevance and effectiveness. For example, while initiatives like the Regenerative Tourism Framework and skills audits have been well-received, stakeholders stressed the importance of sustained implementation and scaling of these early efforts.

Additionally, many visitor attractions and venues face significant challenges that may require targeted strategic investment to ensure their sustainability and growth. Addressing these challenges is crucial for maintaining momentum and achieving the long-term objectives of the Visitor Economy in the region.

Appendix A: Evaluation Questions and Approach

EQ1: Delivery and Process Review

- **EQ1.1 (Designing the DDP):** How effectively was the DDP and its programmes of activities designed?
- **EQ1.2 (Delivering the DDP and its Activities):** How was the DDP and its activities marketed, communicated and delivered and what lessons were learnt?
- **EQ1.4 (Co-ordinating the DDP's Activities):** To what extent were stakeholders involved in the delivery of activities?
- **EQ1.5 (Monitoring the DDP and its Activities):** How are delivery, spend and impact achievements measured, monitored and evaluated?
- **EQ1.6 (Managing and Governing the DDP):** How have the decision-making process and governance structures for the DDP functioned in general?
- **EQ1.7 (Legacy of the DDP):** What is the legacy of the DDP in terms of its structural design, operational activities, and strategic approaches that could serve as a model for future initiatives?

EQ2: Review of Impacts

- **EQ2.1:** What early evidence is there that the DDP and its programme of activities have delivered against its headline objective to unlock the potential in the North-East of England Visitor Economy by delivering 6% growth per annum for the period of the pilot DDP and a 10-year growth target from £5.2 billion to £10.3 billion, using 2021 economic performance figures as the baseline?
- **EQ2.2:** What early evidence is there that the DDP and its programme of activities have delivered against the aims and objectives set out in the Delivery Plan:
 - Increase quality and the range of destination management activities being undertaken across the North-East of England
 - Increase involvement in local investment, planning and transport decisions with positive outcomes and benefits for the local Visitor Economy
 - Increase involvement in local investment, planning and transport decisions with positive outcomes and benefits for the local Visitor Economy
 - Attract and grow business events in the pilot DDP area to be evidenced by the pipeline number of secured events and economic value
- **EQ2.3:** What early evidence is there, that the DDP and its programme of activities have contributed against the aims and objectives within DCMS' Tourism Recovery Plan and the de Bois Review?
- **EQ2.4:** What strategic added value, unexpected or unintended outcomes or impacts have occurred?

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