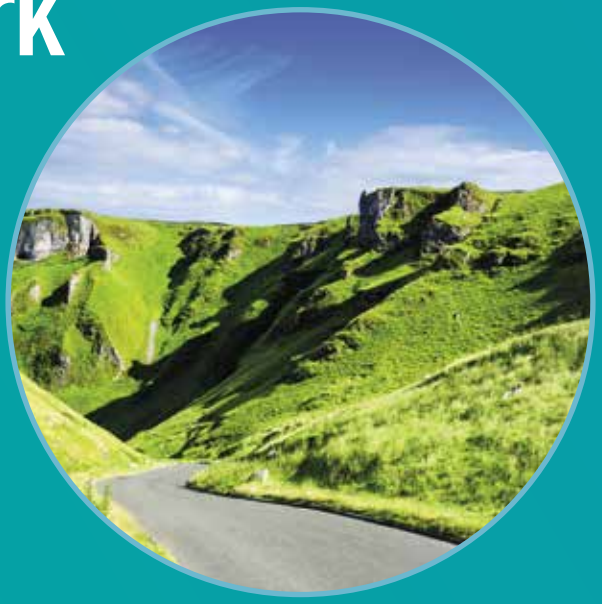
Visitor Economy Strategic Framework









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Mayoral Foreword



The East Midlands is a place I am proud to call home.

It is a region that has shaped the world, with breathtaking landscapes, internationally recognised heritage, a rich cultural offer, sporting excellence, and a proud tradition of innovation. This is manifested through an exceptional combination of assets: the Peak District, Sherwood Forest, vibrant cities, distinctive market towns and villages, major sporting venues, unique cultural experiences, and globally recognised brands.

Ours is an identity that holds and celebrates these contrasts: old and new, tradition and rebellion, industry and nature.

This translates into a visitor economy that contributes more than £5 billion annually and supports over 55,000 jobs across our towns, cities, and rural communities. This is something we know we can grow, and the East Midlands Growth Plan sets a clear ambition for this growth: an extra £1 billion by 2035.

This Strategic Framework sets out how we will achieve that ambition, and we have every reason to be confident.

With more power locally through greater devolution, we are in a strong position to unlock greater value from our investments into commercial development, homes, transport, skills, innovation, and destination development.

Working through the Visit East Midlands Partnership, we will draw on the strengths of our local partnerships to strengthen collaboration across the public and private sectors, creating a more coherent, connected, and competitive visitor economy for the region.

Our ambition is not simply to attract more visitors. We want more visitors, staying for more nights, and spending more: so they can discover the full richness of our region. We want to strengthen our national and international profile. And we want to ensure that more communities benefit from the opportunities that the visitor economy creates. Economic growth matters, but we will measure our success by the extent to which that growth supports local businesses, creates opportunity for residents, and enhances the places we are proud to call home.

This framework sets a path for the next decade. By working together, we can unlock the full potential of our visitor economy, drive sustainable growth, and strengthen the East Midlands' position as one of England's most distinctive, diverse, and ambitious regions.

1. Executive Summary

The East Midlands visitor economy is a regional strength; contributing to inclusive economic growth, place vibrancy, regional and UK-wide soft power.

This framework sets out how partnership working through Visit East Midlands will achieve £1 billion GVA growth, moving to a coordinated and high value visitor economy system that supports strong individual destinations, and creates cross-region initiatives that make the most of our rich assets across sport, culture, heritage, nature and business.

This is underpinned by two linked shifts in performance. First, the region will need to increase overnight visitors by 50%, from around eight million to around 12 million by 2035. Secondly, total visitor spend will need to increase by 50%, from £5.48bn to £8.22bn.

The visitor economy contributes more than £5 billion to the regional economy and supports over 55,000 FTE jobs, but future growth needs a coordinated and collaborative approach to investment, destination development, business support, skills, transport, and innovation.

Working through the Visit East Midlands partnership the region will increase productivity, improve business resilience, grow overnight stays, attract investment, strengthen the international profile of the region and ensure that the benefits of growth are felt by businesses and communities in the region.

Visitor Economy and place are integrated levers for growth in the East Midlands; this integration is a national USP and the heart of our policy approach - a high growth sector embedded across spatial plans, infrastructure development and inclusive growth priorities. It's reflected in major projects like the Trent Sports District, developing a long-term vision for sport-led regeneration and event tourism within the Trent Arc; Peak Resort, which represents a significant new visitor destination and gateway to the Peak District; and the Mini Switzerland pilot in the Hope Valley, which is exploring new approaches to rural accessibility and sustainable transport that can benefit both residents and visitors.

The framework is built around a small number of strategic priorities designed to work together to deliver new infrastructure, quality product, sector-relevant business support, impactful skills and workforce development, place marketing and international growth, all underpinned by data and insight to drive performance. It responds directly to the opportunities and challenges identified through engagement with businesses, local authorities, local visitor economy partnerships, national partners and the Visit East Midlands Advisory Board.

By creating a coherent and collaborative regional system through Visit East Midlands this framework aims to support sustainable long-term growth, increase visitor spend and length of stay and establish the East Midlands as England's most connected and compelling destination, recognised nationally and internationally for combining world-class landscapes, iconic stories, sporting excellence, culture and innovation within one accessible region.

2. Our East Midlands Region

Our place story is multi-layered. The East Midlands is a region powered by movement, making and myth: the engine-room at the heart of the country.

It's home to the Peak District National Park, the first national park in the UK, born from the right to roam.

It's a place of mills, railways and modern engineering, with Derby at its heart; a city that powered industrial Britain, home to the world's first factory and a city that continues to pioneer.

It's a region-wide culture of creativity and innovation anchored by Nottingham, a core city defined by invention, independence and storytelling and where passion for sport is as deep and enduring as the radical symbolism of Robin Hood and Sherwood Forest.

That story of place underpins a powerful asset base including Derwent Valley Mills UNESCO World Heritage Site, Chatsworth House, UNESCO Cities of Literature and Learning in Nottingham and Derby, the Peak District, a nationally significant concentration of elite sports venues within the Trent Sports District, internationally recognised cultural and heritage venues like Nottingham Contemporary and Buxton Opera House and a growing business and academic tourism offer anchored by major global firms and universities in Derby and Nottingham.

The East Midlands' rural landscapes, market towns, villages and rural businesses are integral to the region's visitor economy. They support distinctive food and drink, outdoor, nature and wellbeing experiences that extend stays, increase visitor spending and spread economic benefits across the region, while contributing to thriving rural communities and the long-term stewardship of the region's natural environment.

2.1 Our Regional Context

The East Midlands' competitive advantage lies in the combination of city and landscape, heritage, culture and creativity, globally significant assets and distinctive local character, all within a geography that occupies a uniquely connected position at the heart of the country.

It can capture national visitor flows in a way that few other regions can, acting as a hub for access, a base for exploration, and a connector between destinations regionally and pan-regionally.

The East Midlands Growth Plan (2025) evidences the potential of this advantage, identifying the visitor economy as a high growth sector and setting out an ambitious growth target of £1 billion GVA by 2035. At the same time, the Regional Economic Development Review (2025) identified structural constraints in the visitor economy system, summarised as lack of coherence, structural fragmentation and limited investment.

The policy response that underpins this framework draws on the power of devolution and the strategic levers of an established Mayoral Strategic Authority; transport, infrastructure, skills, economic development and green growth. The visitor economy is embedded within long-term infrastructure planning and wider inclusive growth ensuring that residents and communities directly benefit.

It directly addresses the systemic structural imbalances in the UK's visitor economy, where benefits of inbound tourism are disproportionately concentrated in London, attracting 54% of all international visitors.

Visit East Midlands brings together a partnership of EMCCA, constituent local authorities, local visitor economy partnerships (LVEPs), destination management organisations (DMOs) and the sector, supported by the strategic and sector-facing Visit East Midlands Advisory Board.

Delivering this ambition will require a step change in how partners work together to truly leverage the possibilities of devolution and an established Mayoral Strategic Authority. The Visit East Midlands partnership establishes the basis for that deeper collaboration. It will work in parallel with Invest East Midlands, reinforcing the region's identity rooted in place and defined by creativity and innovation, and a compelling place to visit, live, work, study and invest.



3. Regional and National Visitor Economy

3.1 Introduction

The visitor economy is a complex economic ecosystem. Because of its interdependent nature, spanning attractions, accommodation, hospitality, cultural venues, conferences, festivals and events, retail, transport and extensive supply chains, the sector generates a blend of direct, indirect and induced economic benefits. Understanding the full economic impact of the visitor economy therefore requires consideration of both visitor spending and the wider economic value that spending creates within destinations, businesses and communities.

The East Midlands Growth Plan identifies the visitor economy as a high-growth sector and sets a ten-year ambition to grow GVA in the sector by £1 billion by 2035, based on the 2023 STEAM evidence.

The latest 2024 STEAM estimates show that the sector continues to operate at significant scale, with approximately eight million overnight visits, more than 70 million day visits, £5.48 billion in direct visitor expenditure and supported 55,700 FTE jobs.

Direct spend is the total amount visitors pay for goods and services, while GVA (Gross Value Added) is the economic value that spending adds to the local economy after subtracting the cost of the bought-in inputs used to supply it.

The greater visitor spending destinations can attract, the more beneficial the knock-on (multiplier) effects are in their economies to stimulate economic, employment, and productivity growth. This drives the strategic priority of attracting more higher spending domestic and international staying tourists, prioritising increasing the value of visits rather than volume.

3.1.1 The National Picture – Forecast UK Growth Presents Challenges and Opportunities for the East Midlands

The current scope and scale of the UK visitor economy is shown by research prepared by Tourism Economics on behalf of Visit Britain/Visit England[1].

- There were 43 million inbound international tourist visits to the UK plus 1.2 billion domestic trips. Of the domestic trips, 108 million involved an overnight stay and one billion were day trips. Trips made for leisure purposes, holidays, and visiting friends and relatives made up the highest number of both international and domestic trips in 2024, followed by business and other trips.
- Whilst domestic tourism dominates currently in terms of the volume of trips, it generates a lower economic contribution than international tourism because of the lower average spending per trip. The average spend per international tourist trip was £763[2] compared with £312[3] for domestic overnight tourism trips.

1 Tourism Economics (2026) Economic value of tourism in the United Kingdom. Prepared for Visit Britain/Visit England. Published on 20th January 2026.

2 Visit Britain (2025) Annual Inbound Update Total GB / UK. Final 2024 estimates. International Passenger Survey by ONS. Published 26th August 2025.

3 Visit England (2025) GB Tourist Annual Report, 2025. Domestic overnight trips in Britain and England. Great Britain Tourism Survey. Published on 29th May 2025.

- Total UK visitor activity contributed £206 billion to UK Gross Domestic Product (GDP)[4]. This accounted for over 7% of the UK national economy, highlighting the sector's economic importance.
- 3.1 million jobs were supported by the direct, indirect, and induced economic activity (the total impacts). This figure relates to the total of full-time and part-time jobs, including seasonal jobs.

London attracted 54% of overnight international tourism visits to the UK in 2024. This is much higher than other large European cities such as Paris (which accounts for 20% of inbound tourism in France) and Rome (10% of their national total). London has attracted around half of all UK inbound international tourism trips for many years indicating its historical and current appeal to many international markets.

Attracting more inbound international tourists away from London – and having greater regional dispersal - is one of the core opportunities that the Visit East Midlands partnership will leverage.

3.2 The Current Volume, Value, and Profile of East Midlands' Visitor Economy

The 2024 figures are summarised in Table 1. The following can be noted[5]:

- There were 78.1 million trips across the East Midlands in 2024, with approximately eight million overnight trips (10% of the total).
- There is a broad appeal across the region with the Peak District and Derby City and Derbyshire generating 55% of total trips (43.2 million) and Nottingham City and Nottinghamshire 45% of the total (34.9 million).
- Of the total direct expenditure made by visitors during their trips, the Peak District and Derbyshire captured the largest share (i.e. £3.6 billion versus £1.9 billion in Nottinghamshire). The average visitor spend for all types of trips (day trips and overnight stays) was £83 in Peak District/Derbyshire and £54 in Nottingham/Nottinghamshire. The higher average spending reflects the greater proportion of overnight trips Peak District/Derby/Derbyshire.
- Whilst day trips were the highest volume (when compared with overnight visits), they generated lower value per trip (i.e. the Peak District and Derbyshire's figures were £52 per day trip versus £346 per trip involving an overnight stay in serviced and non-serviced visitor accommodation, or with friends and relatives[6]).
- The visitor economy supported a total of 55,700 full-time equivalent (FTE) jobs across the East Midlands[8]. The total jobs include jobs supported by the direct visitor spending plus the indirect and induced employment supported through local businesses and residents spending tourism-related income locally.

4 GDP reflects the the value (after accounting for costs) a sector – in this case the visitor economy – receives for providing services and goods. This value is distributed between wages and profits (Tourism Economics, 2026).

5 2024 STEAM reports for (1) Peak District and Derbyshire and (2) Nottinghamshire.

6 Based on an average length of stay in Visit Peak District and Derbyshire of 3.3 nights across all types of visitor accommodation in 2024, this equated to an average spend per day of £106 in 2024. The highest average spend per day was in serviced accommodation (£136), followed by non-serviced accommodation (£116), and then staying with friends and relatives (£69).

7 A 'full-time equivalent' (FTE) job is a way of standardising employment so that different working hours can be compared. It is a measure used in STEAM reports and in other economic impact assessments. The FTE measure converts all roles into the equivalent of full-time hours. A full-time worker counts as 1 FTE, while part-time or casual workers (which of course are commonplace across the visitor economy) are counted in proportion to the hours they work. For example, if full-time work is 40 hours a week, someone working 20 hours would be counted as 0.5 FTE.

Table 1: The Volume, Value, and Profile of East Midlands' Visitor Economy, 2024

Measure	Visit Peak District, Derbyshire, and Derby	%	Nottinghamshire	%	East Midlands total	%
VOLUME OF VISITS						
Day trips - thousands	38,630	89%	31,470	90%	70,100	90%
Overnight trips - thousands	4,573	11%	3,409	10%	7,982	10%
Total trips - thousands	**43,203**	**100%**	**34,879**	**100%**	**78,082**	**100%**
VALUE OF VISITS						
Direct visitor spending - £ million	£3,588		£1,887		£5,475	
EMPLOYMENT SUPPORTED						
Total jobs supported (FTEs)	33,114		22,557		55,671	

Source: 2024 STEAM reports for (1) Peak District Derby and Derbyshire and (2) Nottinghamshire and Nottingham.



3.3 East Midlands Visitor Accommodation Review (July 2026)[8]

The 2026 East Midlands Visitor Accommodation Review provides a strong evidence base demonstrating that accommodation development is a key enabler of visitor economy growth across the region. The review concludes that the region already has a substantial accommodation offer, comprising 7,485 establishments and over 98,000 bed spaces, but that future visitor economy ambitions will not be achieved without significant investment in new and enhanced accommodation capacity.

The research highlights a diverse accommodation ecosystem spanning hotels, self-catering, holiday parks, camping, motorhomes, hostels and group accommodation. Nottingham and Derby provide the region's main urban accommodation hubs, while Derbyshire, Nottinghamshire, the Peak District and Sherwood Forest underpin the region's leisure, outdoor recreation and rural tourism offer.

The Peak District emerges as the region's strongest performing leisure accommodation market, while Nottinghamshire is identified as a fast-growing and increasingly important urban-led accommodation market.

Looking ahead, growth in visitor demand will be underpinned by the spatial development priorities within EMCCA's Vision for Growth, the continued international appeal of the Peak District and Sherwood Forest, and expanding opportunities in active outdoor tourism, major sporting and cultural events, and business tourism associated with strategic growth sectors and investment zones.

Evolving visitor expectations and the expanding market for experience-seekers will further drive growth, with increasing demand for sustainable, wellness-focused, accessible and experience-led travel. This is creating new opportunities for innovative accommodation and destination development, including eco-lodges, treehouses, wellness retreats, premium self-catering accommodation, boutique hotels, and destination resorts.



8 East Midlands Visitor Accommodation Review – Hotel Solutions – July 2026



Based on modelling undertaken to support the Framework's ambition of increasing overnight visits by 50% by 2035, the East Midlands is likely to require significant growth in both serviced and non-serviced accommodation stock.

Indicative modelling suggests a need for approximately 3,500 additional serviced accommodation rooms (equivalent to around 35 new 100-room hotels at sustainable occupancy levels) alongside approximately 8,500 additional non-serviced accommodation spaces, including holiday lets, camping, caravan, and glamping provision.

These figures represent an estimated increase of around 12,000 additional accommodation units overall and highlight the scale of investment required to support future visitor growth.

Delivery will need to reflect local market conditions, demand profiles, infrastructure capacity and environmental considerations, with a focus on both increasing capacity and improving utilisation of existing accommodation stock.

4. Destination Strengths, Constraints and Market Position

The Economic Development Review (2025) by EMCCA and the destination management plans (2025) developed by Visit Nottinghamshire and Visit Peak District & Derbyshire consistently highlight the same strengths and limitations of the region;

4.1 Current Strengths

- Central UK location with good accessibility and transport connectivity, particularly by road and rail.
- A compelling and successful visitor offer with a mix of city, countryside, culture, and heritage.
- A diverse range of destinations, attractions (including flagship attractions), programme of sporting, business, and cultural events and festivals, and accommodation.
- Globally recognisable place and cultural brands, including the Peak District National Park, Chatsworth, Robin Hood, Nottingham Forest Football Club, Paul Smith and Rolls-Royce. The strong awareness of these brands was confirmed through research undertaken by Brand Finance[9].
- Good partnerships which have been enhanced further through the Local Visitor Economy Partnerships and their destination planning processes.



9 Brand Finance (2026) East Midlands Report - Assessing your destination brands, informing strategic direction, and maximising economic impact.

4.2 Current Limitations

- Industry fragmentation at the regional level. This suggests that at present, coordination between stakeholders is sub-optimal. There could be duplication of regional effort, inefficiencies in regional resource allocation, and missed regional opportunities.
- Gaps in visitor product, itineraries and infrastructure, including underdeveloped flagship brands like Robin Hood. There is an opportunity for targeted investment and development to strengthen core attractions and brands and create even more compelling and marketable visitor propositions and itineraries.
- Inconsistent destination marketing and branding. A lack of clarity in how the East Midlands and its destinations/brands are positioned to target audiences dilutes the full potential of marketing campaigns and limits the ability to exploit the full potential of the region's destinations and brands.
- Transport and accessibility challenges, particularly in rural areas, and in terms of public transport. With some parts of the East Midlands challenging for visitors to reach without a car, this constrains visitor flows and dispersal, limits dwell times within destinations, and reduces the overall economic impact of tourism. Getting more visitors onto public transport would also be beneficial environmentally.
- The negative perceptions of tourism jobs which create recruitment, retention, and service quality challenges. Without addressing these issues, businesses will continue to face ongoing staffing pressures, which will impact visitor experience, productivity, and long-term sector growth.
- Limited digital connectivity in rural areas, which affects both visitors and businesses.
- Seasonality of demand. Demand seasonality has implications for regional tourism and wider visitor economy visitor attractions, accommodation, and other businesses including pricing decisions, income and profit/cash flow volatility over the year (including how to cover fixed costs during quieter periods of demand), opening hours, capacity pressures versus underutilisation (e.g. overcrowding and congestion at peak times which affects the visitors' experience and creates negative environment impacts), and what this means in terms of staffing and skills shortages, and investment challenges.
- Region-wide visitor economy data and market intelligence. In 2025, EMCCA undertook an audit and review of visitor economy data and insight[10]. This found fragmented data collection, limited access to real-time insights, and underutilised collaboration between stakeholders.







10 EMCCA (2025) Data and Insight Review for the EMCCA Region Visitor Economy.

4.3 Destination Branding and Market Position

In addition to the analysis undertaken within the Destination Management Plans, independent research into the East Midlands' visitor economy brands has been completed by Brand Finance[11].

The evidence confirms that the region is not starting from a position of weakness; it possesses a strong underlying asset base and nationally significant attractions. However, this strength is not translating consistently into visitor value, length of stay or spend.

At an asset level, the region benefits from a number of high-performing "anchor" destinations, including the Peak District National Park, Chatsworth House and Sherwood Forest, which demonstrate both high levels of awareness and strong conversion into visits. These assets already function as primary draws to the region and provide a strong platform for demand generation. Alongside these anchors, the analysis also identifies a substantial number of "hidden gem" attractions which exhibit strong appeal among those who visit but remain relatively low in awareness. This indicates clear potential to increase demand through improved visibility, storytelling and a focus on experiences.

The evidence highlights a consistent pattern of assets that are well known but under-converting into visits. This is a structural issue across the region and reflects a more fundamental challenge in how the visitor offer is presented and experienced.



At a destination level, the analysis of visitor drivers for longer stays reinforces this picture. The East Midlands performs strongly on core motivators such as heritage, landscape, variety of attractions and outdoor activity, which are already well aligned with the expectations of domestic and international leisure markets.

However, the region underperforms in several critical areas that are strongly associated with longer stays and higher visitor spend. These include a clearly defined destination identity, the awareness of the strength of the food and drink offer, and the vibrancy and innovation of the evening and wider experience economy.

By aligning product development, storytelling and coherent market activity, and by structuring the visitor offer at a regional scale, the East Midlands can move to a more coherent and higher-value visitor economy system capable of maximising economic impact.





11 Brand Finance (2026) East Midlands Report - Assessing your destination brands, informing strategic direction, and maximising economic impact.

5. Strategic Priorities and Delivery

The evidence demonstrates that achieving £1 billion inclusive growth will require action on both the supply and demand sides of the visitor economy. Major opportunities are emerging through developments such as the Trent Sports District, Peak Resort, Great British Rail and The Foundry and a growing pipeline of cultural, sporting and place-based investments.

The East Midlands' visitor economy is characterised by diverse destinations with differing opportunities, challenges and development needs. A place-based approach will ensure that investment and interventions are tailored to local circumstances, reflecting variations in visitor demand, infrastructure capacity, connectivity and environmental considerations. This will support sustainable and restorative growth across the region while protecting the distinct qualities of each destination and ensuring local communities benefit from visitor economy success.

Devolution provides a unique opportunity to align investment, planning, transport, skills and business support behind a shared ambition for growth, supported by mayoral leadership and regional coordination.

These opportunities have directly shaped the framework's five priorities: developing outstanding visitor products and experiences; growing demand through destination marketing and promotion; strengthening skills and business capability; improving connectivity and the visitor environment; and providing the leadership, partnerships and intelligence needed to deliver at scale.



Priority 1

builds the offer, places and infrastructure that support visitor economy growth, including attractions, accommodation, public realm and transport connectivity.

Priority 2

grows demand for that offer through marketing, travel trade, business tourism.

Priority 3

develops the workforce and **ensures the benefits of growth are shared**.

Priority 4

ensures people can access, **move around and explore the whole region**.

Priority 5

improves **decision-making**, **productivity** and **competitiveness** through data, insight and innovation.



IMAGE © VISIT DERBY

5.1 Strategic Priority 1: Develop Visitor Infrastructure, Propositions, Products and Experiences that are Stronger, More Innovative and Connected By Design

The evidence base demonstrates that the East Midlands isn't constrained by the quality, distinctiveness or breadth of its assets, but how those assets are structured, connected and brought to market.

Working with partners and sector businesses, we will bring forward a targeted programme of strategic development and investment in visitor economy product and enabling infrastructure, focused on interventions that increase length of stay, visitor spend and overall economic yield.

Investment will be directed towards strengthening existing assets and supporting the development of new ones, designing new premium or experience-led products, and packaging market-ready propositions and itineraries that can compete at national and international levels.

Interventions should be developed based on customer need, and the Visit East Midlands partnership should create the environment for stakeholders to cluster product and experiences from across the region and beyond. E.g. encouraging city-based conference visitors to extend their break and explore our rural areas.

Consideration should also be given to product development that addresses challenges and opportunities around seasonality and capacity.

Given the strength of our culture, heritage and landscape offer we will work with national agencies and sector bodies such as Arts Council England and Historic England to co-ordinate and align investment.

5.1.1 Major/Significant Events

A core component of this approach will be the development of a strategic events pipeline, leveraging the proven role of major cultural, sporting and business events to maximise overnight stays, increase visitor spend, generating year-round visits and grow the region's national and international profile.

A snapshot of the current major event pipeline, including UCI World Cycling Championships in 2026, Tour de France Femmes Grand Depart in 2027 and the European Archery Championships in 2028 shows that the region has good event hosting capacity, but the number and range of events is lower than it could be for a region with our assets and central location, with limitations on the region's capability and resource for major event bidding, origination, curation and hosting.

Initially, we will support the development of a small number of significant events and festivals that will attract domestic and international visitors to new and authentically rooted experiences in the region, while working with partners to develop a longer-term pipeline, and under priority 2, develop the underpinning capacity to grow the impact of events.

5.1.2 Creative and Cultural Innovation

Innovation is essential for sector growth. We will work in partnership with universities and creative and cultural organisations to support Uplift - a programme of immersive, technology-enabled experiences across cultural, heritage and civic spaces. This will support innovation in the visitor offer, attract new audiences and position the East Midlands at the forefront of

contemporary experience design, particularly in areas such as digital interpretation, storytelling and place-based cultural production.

5.1.3 Product Development

Enhanced and more accessible product is consistently cited as a development requirement for the visitor economy. We will establish a product development programme to support the creation and enhancement of high-quality visitor experiences that showcase the East Midlands' distinctive strengths.

Eligible activity could include independent food and drink experiences, cultural venues, evening economy, heritage attractions, exhibitions, sporting experiences, outdoor, and nature-based tourism, immersive experiences, improving accessibility to meet customer's needs, and bookable themed itineraries. Support will focus on developing market-ready products with a clear route to market which support the ambitions of this framework.



5.1.4 Capital Infrastructure Including Accommodation Supply

Significant visitor-focussed infrastructure has the potential to be developed through the spatial priorities in the Vision for Growth, including the Trent Sports District, The Foundry and business tourism opportunities stimulated by Great British Rail as part of Trent Arc, PEAK resort as part of Canal Corridor, Sherwood Forest in The Heartlands, and Derwent Valley Mills identified as its own spatial priority.

Investment opportunities should support the strategic vision for the region and achieving the ambitions of the growth strategy and the vision for growth.

Achieving the ambitions of this Framework will require coordinated action across EMCCA and partner organisations to identify and align capital investment opportunities. By working together to develop investment-ready projects, strengthen business cases and promote opportunities to investors, partners can help create the conditions needed to secure investment in accommodation, infrastructure, attractions and destination development across the region.

Accommodation supply needs to be a feature of spatial priority developments, recognising that the 10-year growth target creates a substantial additional capacity target. Section 3.3 highlights the findings of the Accommodation review. There will need to be interventions both on a supply side, working to attract investment and a demand side to attract more visitors to the region.

While any proposed investment or development will be subject to EMCCA's single assurance framework and full business case, this visitor framework can support those investment decisions to ensure that they reach the widest scope of beneficiaries, including the visitor economy.

In addition, business cases for programmes of earlier-stage and smaller scale schemes will be developed during 2026/7 to support sustained growth over the medium to long term. This intends to include investment in creative industries and infrastructure to support screen tourism, as well as a targeted culture, heritage, sport and public realm small capital programme that will uplift quality, capacity and resilience.



IMAGE © VISIT NOTTINGHAMSHIRE

5.2 Strategic Priority 2: Growing Inbound and Domestic Markets

Analysis of visitor volume and value shows a clear structural imbalance in the East Midlands' demand profile. The region attracts significant numbers of visitors, over 70 million day trips annually, but these trips generate relatively low economic value compared to overnight and international markets. At the same time, international market share remains low relative to comparator regions.

This reflects a combination of factors: an over-reliance on day visitors and a fragmented approach to marketing, branding and routes to market. While awareness of key assets is strong, conversion and relevance to target audiences are inconsistent.

To deliver the Growth Plan ambition, demand generation will focus around higher-value domestic and international segments that stay longer, spend more and travel year-round. This requires a coordinated, regionally led approach to market development, business support, trade engagement, brand management and marketing.

Activity will also focus on the attraction of existing visitors to return to the region, to change from a day visitor to a staying visitor, to stay longer and at different times of the year where there is currently lower demand.

Visit Britain's Mosaic[12] research completed in Britain's key overseas markets identified that London dominates because it is simple and complete, Britain's regions have broad appeal and limited differentiation. It supports the principles of this framework identifying that experience drives choice, growth depends on extending trip length and converting higher value trip types and that the challenge is primarily packaging and marketing, not product.

The research identifies that the wider East Midlands, which includes Derbyshire and Nottinghamshire, Lincolnshire, Leicestershire, Northamptonshire has the lowest likelihood to visit pre stimulus in researched markets of all regions. The research suggests showcasing the hero destinations, products and experiences, aligning to key consumer themes that enable a connected England proposition.

This framework commits to a collaborative consumer-focused approach including targeted investment in marketing, coordination of product and itineraries and travel trade development and readiness activity.

5.2.1 Regional Screen Office

There is significant growth in screen tourism nationally and strong signs of sector growth in the East Midlands, including increased demand for location services, successful film festivals in Mansfield and Beeston, the BFI Film Hub Midlands based at Broadway Cinema, The Foundry production studio in Derby and a mandate from Derbyshire County Council to support the screen industries.

This growth has built strong momentum from partners, and we'll build on this by establishing a regional screen office to drive the attraction of productions to the East Midlands, support sector development and talent retention, generating direct economic activity and strengthening the region's profile.

12 Project Mosaic – Audience / Product Fit Research – Visit Britain – September 2026

5.2.2 Inbound Travel Trade Development

International trade readiness is a well-evidenced challenge in the region. Many businesses lack the capability or scale to engage effectively with intermediaries, limiting growth in international and group markets.

We will commission an Inbound Travel Trade Development Programme to improve trade-readiness, support SMEs to work with international operators and develop a portfolio of commissionable, market-ready products and itineraries. Working with VisitBritain, LVEPs and industry partners to develop buyer relationships, key accounts and distribution channels for East Midlands tourism products.

The programme will support businesses with trade-readiness, pricing, contracting, commissions and digital distribution; create buyer-ready itineraries and themed packages; deliver familiarisation visits and trade engagement activity.

The objective is to increase the volume of trade-ready visitor economy businesses, strengthen international market presence and generate sustainable growth in overseas visitor spend across the region.

This will be underpinned by a regional travel trade strategy identifying priority international markets, demand segments, transport gateways and routes to market, supported by stronger use of VisitBritain intelligence and closer alignment with national trade activity.

5.2.3 Conferencing and Events Bureau

MICE – Meetings, Incentives, Conferences and Exhibitions is one of the highest-value parts of the visitor economy. According to research from VisitBritain[13], the UK events industry is worth around £61.7 billion annually, of which business events account for £33.6 billion. That breaks down into conferences and meetings (£16.3bn), exhibitions and trade shows (£10.9bn), business travel meetings (£4.0bn) and incentive travel (£2.4bn).

It isn't subject to the same level of seasonality as leisure tourism and fills hotel accommodation midweek. MICE activity tends to be focused in cities due to transport connectivity and concentration of facilities. It has a wider economic impact as a route to inward investment,







13 Understanding Business Visits - Visit Britain 2024

Meet in Nottingham delivers a conference bureau facility for Nottinghamshire, however it's under-resourced to achieve market potential, and there is no dedicated equivalent function in Derby.

We will support pilot activity for joint attendance at trade events, and commission a feasibility study to develop a business plan and structure options for a regional conference and events bureau, building on wider opportunities such as Trent Arc, Trent Sports District, Step Fusion, and Team Derby.

5.2.4 Telling our Story: Destination Marketing and Place Marketing

5.2.4.1 Place Marketing and Place Narrative

Working alongside the Team East Midlands initiative, Visit East Midlands will support a coordinated place marketing approach that promotes the East Midlands as a vibrant, distinctive and attractive place to live, work, visit, study and invest. This will showcase the region's cultural assets, major events, sporting strengths, heritage, landscapes and quality of life as part of a wider place narrative, helping to strengthen regional identity, attract talent and investment, and enhance the reputation of the East Midlands nationally and internationally.

Marketing will be customer-focused using the appropriate place and product brands to attract target audiences which will help strengthen the East Midlands reputation as a visitor destination.

The Bloom Consultancy study *The Impact of National and Place Brands on the Local and Global Economy*[14] found that perceptions of places accounted for 23% of tourism receipts, 37% of foreign direct investment inflows and when looking to attract talent, 22% of net migration.

5.2.4.2 Destination Marketing Programme

Alongside this, Visit East Midlands will commission a targeted destination marketing programme focused on driving measurable visitor economy growth.

Activity will be informed by market insight and delivered through a mix of consumer marketing, digital campaigns, PR, partnership activity and travel trade channels, targeting priority domestic and international audiences. The programme will focus on increasing visitor numbers, visitor spend, overnight stays and length of stay, and supporting the growth of higher-value market segments across the East Midlands.


IMAGE © VISIT DERBY



IMAGE © VISIT DERBY



IMAGE © VISIT PEAK DISTRICT AND DERBYSHIRE

14 Bloom Consulting: *The Impact of Nation and Place Brands on the Local and Global Economy* - 2024

5.3 Strategic Priority 3: Workforce, Skills, Civic and Centre for Excellence

As an established Mayoral Strategic Authority, EMCCA will be able to play a stronger role in shaping and aligning post-16 skills provision with the needs of the visitor economy. Working with EMCCA's skills team, colleges, universities, independent training providers and employers across the region, we will support the development of coordinated sector pathways in hospitality and catering, visitor attraction management, event management, sport and leisure, cultural production, heritage interpretation, digital content creation and business tourism.

This is an opportunity to develop region-wide partnerships that bring together providers and employers to co-design courses, expand industry placements, work experience and apprenticeship opportunities, and create clearer progression routes into employment. By working collectively across the East Midlands rather than through isolated local programmes, providers can respond more effectively to employer demand, address skills shortages and ensure residents are equipped with the skills needed to support future visitor economy growth.

Over the next 3-5 years we will establish this systemic working into a Visitor Economy Skills Centre for Excellence and Opportunity. The centre wont' be a single physical building, but a new connected commissioning approach that will provide a clear, structured pathway from entry-level roles into higher-skilled, better-paid and more secure employment, demonstrating in practice how progression can be designed and delivered at scale within a major regional employment sector. It will operate as a coordinated network of employers, colleges, universities and training providers.



IMAGE © DESTINATION CHESTERFIELD / SCOTT ANTCLIFFE

The visitor economy offers accessible entry points across a wide range of roles and geographies, including city centres, market towns and rural destinations, and provides significant opportunities for non-graduate routes into work. However, progression is currently inconsistent and often opaque, with limited visibility of career pathways.

The Centre will address these structural issues by embedding the core principles of the Opportunity Escalator: clear entry points, defined progression steps, and supported transitions between roles and skill levels. Working directly with employers, it will map and standardise progression pathways across key occupations, co-design modular training aligned to career steps, and support in-work advancement through targeted development programmes. This will include leadership and management training, sector-specific technical skills, and flexible provision that enables individuals to progress while in employment.

The centre will link skills development directly to sector growth and investment. As new accommodation, attractions and major developments come forward, the Centre will ensure that local people can access the opportunities created and progress within them over time.

The Centre will also act as a convening mechanism, aligning employers, providers and public agencies around a shared approach to workforce development.

Alongside workforce development, we will support and steer accessible business training that reflects the realities of small and medium-sized visitor economy businesses. This could include short, affordable courses delivered online and in person on topics such as digital marketing, AI, customer service, commercial development, sustainability, accessibility and leadership, enabling businesses to upskill staff without significant cost or time away from day-to-day operations.

Where appropriate visitor economy needs should be built into the wider business support ecosystem rather than creating unnecessary bespoke programmes. However, there may be a need for a specific intervention due to sector specialisms or the operating nature of the businesses.

Through the Visit East Midlands website, we'll signpost business to the regional growth hub, ensuring that sector businesses can access wider training initiatives to support their growth.

5.3.1 The Civic Role

The visitor economy plays an important civic role in supporting vibrant places, thriving communities and inclusive economic growth. It creates jobs, supports local businesses, sustains cultural and community assets and provides opportunities for skills development, volunteering and participation. Local people should be at the heart of decision-making, ensuring that tourism growth reflects community priorities and strengthens local pride and quality of life.

The long-term success of the visitor economy depends on protecting and enhancing the natural, cultural and built environments that make the East Midlands distinctive. Growth should be carefully managed to minimise negative impacts, support nature recovery and ensure communities continue to benefit from tourism. By balancing economic opportunity with environmental stewardship, restorative tourism initiatives and community wellbeing, the visitor economy can deliver lasting value for residents, visitors and future generations.

5.4 Strategic Priority 4: Access, Connectivity, and Visitor Distribution

The region's central location and strategic connectivity is a core strength, but the evidence highlights significant gaps in how this connectivity translates into the visitor experience.

First- and last-mile access to key assets is inconsistent, rural transport provision is limited, and fragmented systems limit visitor and workforce movement, dwell time and overall spend.

These limitations directly affect the spatial and seasonal distribution of visitors. Demand is concentrated in a small number of high-profile locations and peak periods, creating pressure on infrastructure and environments, while many secondary destinations and off-peak periods remain underutilised. This is particularly visible in the Peak District National Park.

There is a major opportunity in the sequencing and join-up between the mayor's transport plan and the visitor economy sector plan. We have a unique opportunity (no other MSA has the same convergence) to ensure that connectivity investment is explicitly joined up to the visitor economy; designed to unlock growth, improve productivity and enhance visitor experience.

Through a coordinated approach with the transport plan development, we will bring forward business cases for practical, place-based interventions. This could include strengthening station-to-asset connections, coach parking and infrastructure for group travel, active travel routes and demand-responsive transport; improving rural mobility in high-demand visitor areas where conventional public transport is not viable; and enhancing digital connectivity to support journey planning, real-time information and seamless ticketing.

The Tour de France Femmes Grand Depart in Derbyshire in 2027 will test how transport and visitor interventions can be brought together, from active travel promotion ahead of the event, spectator distribution during the event and cycle infrastructure legacy projects post-event.

We'll work closely on supporting the development of the "mini-Switzerland" rural accessibility model in the Hope Valley and will also draw on international best practice from comparable national parks and protected landscapes, where integrated transport and visitor management systems have successfully balanced access with conservation.

5.4.1 International Connectivity

Better international connectivity in the region is vital to shift the dial on the lower proportion of inbound business and leisure tourists travelling beyond London. East Midlands Airport is positioning itself not only as the UK's leading cargo airport but as a growing passenger gateway, supported by major infrastructure investment, route development activity and an ambition to secure a direct connection to a major European hub airport. This would provide one-stop access to global markets, improving international accessibility for visitors, investors and businesses.

International connectivity must be also considered at a regional system level. Manchester Airport already functions as the principal long-haul gateway for much of the East Midlands, providing direct connections to key international markets including North America, China, India and the Middle East. For many international visitors, Manchester is the arrival point for journeys into the Peak District, Derbyshire, Nottinghamshire and the wider East Midlands.

The region can benefit both from the growth ambitions of East Midlands Airport and proximity to one of Europe's most significant international airports outside London.

We will focus on strengthen relationships with key gateways, aligning product development, market intelligence, and international marketing. Working with East Midlands Airport and Manchester Airport Group, VisitBritain, travel trade partners and destination organisations, we will use data and visitor insight to identify the markets with the greatest growth potential and develop targeted propositions and itineraries that respond directly to visitor demand.

This includes creating multi-day experiences that connect the region's cities, landscapes, heritage and cultural assets into visitor journeys that are easily understood, purchased and promoted through international channels.



IMAGE © VISIT PEAK DISTRICT AND DERBYSHIRE

5.5. Underpinning Priority: Intelligence, Insight and Digital Innovation

This priority will establish the regional intelligence, digital innovation and place promotion infrastructure required to support long-term visitor economy growth. Through the Visit East Midlands website, regional data hub and shared insight platform, partners will have access to the information, tools, content and intelligence needed to make better decisions, coordinate activity and maximise economic impact.

5.5.1 Data and Intelligence

Gathering the evidence base for the framework was a complex process, highlighting issues of fragmented data, inconsistent access to insight, and limited ability to track visitor behaviour, movement and value across the region. There is no 'single source of truth' for this part of the economy.

There is a pressing need therefore to establish a unified, intelligent data system that supports evidence-based decision-making and enhances the East Midlands' competitiveness. Whilst there are some collaborative data sharing agreements in place, there needs to be a way of sharing or making data available to all partners, to give a better understanding of the visitor economy. Currently, barriers such as cost and resources mean that there are districts with no access to any data. Furthermore, there is no standardised benchmarking or baseline data to compare against, and no way of tracking visitor movement across districts.

To address these limitations, we will establish a regional visitor economy intelligence system, hosted on the Visit East Midlands website. This will provide a shared evidence base across EMCCA, local authorities, LVEPs and partners, improving consistency, transparency and the ability to act collectively.

At its core is a regional data hub, bringing together baseline data, market intelligence and performance reporting into a single platform. This will include economic metrics (visits, spend, GVA, jobs), accommodation and capacity data, visitor behaviour and movement, market demand signals and wider indicators relating to sustainability and place.

Data will be collected and accessed in a way that is comparable to give a better understanding of the visitor economy and deliver the strategic priorities, aligning to VisitBritain and VisitEngland activity so the region can benchmark against other areas.



The hub will support four key functions:

- Strategic decision-making, identifying priority markets, assets and investments
- Performance management, tracking delivery against Growth Plan outcomes
- Market optimisation, targeting higher-value segments and improving conversion
- Visitor management, supporting better distribution, sustainability and place outcomes

It will also enable a step change in evaluation, will strengthen accountability and ensure that public investment is directed towards interventions that deliver demonstrable economic impact.

In due course, the evidence base will move beyond economic performance to include sustainability, community impact and spatial distribution. This reflects emerging best practice in tourism policy, where destinations must balance growth with place stewardship.

5.5.2 Visit East Midlands Digital Platform

The Visit East Midlands website will be the regional platform for visitor economy growth, collaboration and place promotion. As the digital home of Visit East Midlands, it will showcase the region's strengths, opportunities and ambitions, helping to position the East Midlands as a vibrant place to visit, live, work, study and invest.

The website will provide a single access point for sector intelligence, research, performance data and market insight through the East Midlands Visitor Economy Data Hub. It will host the Visitor Economy Strategic Framework, investment opportunities, major projects, funding programmes and industry resources.

The platform will play a central role in regional place marketing, promoting the East Midlands' distinctive strengths across culture, heritage, landscape, sport, major events, business tourism and quality of life. Working alongside Invest East Midlands and the Team East Midlands project, it will support a coherent regional narrative and strengthen the East Midlands' profile nationally and internationally.

Consumer destination marketing will continue to be delivered through the established websites and channels of Visit Peak District & Derbyshire, Visit Derby and Visit Nottinghamshire. Consumer channels will be clearly signposted, ensuring the platforms work together supporting growth across the whole system.

5.5.3 AI and Digital Innovation

Artificial intelligence presents a significant opportunity to accelerate productivity, innovation and growth. Through the Visit East Midlands website, data hub and intelligence function, partners will explore how emerging technologies can improve destination intelligence, visitor insights, market forecasting and campaign effectiveness.

At a business support level, AI has the potential to support visitor-facing services, personalised marketing, content creation, itinerary planning, customer engagement and operational efficiency, helping businesses reach new markets and improve productivity. Visit East Midlands will work with universities, colleges, innovation partners and the sector to identify practical applications of AI, support knowledge sharing and ensure that businesses of all sizes can benefit from technological innovation as the visitor economy continues to evolve.

6. Growth Trajectory

The Growth Plan ambition is to increase the direct GVA contribution of the East Midlands visitor economy from £5.3bn in 2025 to £6.3bn by 2035 in real terms. This growth modelling is expressed as a trajectory to show the scale and direction of change required.

The central growth trajectory assumes successful delivery of the Visit East Midlands Strategic Framework and the five strategic priorities set out in Chapter 5. On this basis, direct visitor economy GVA would increase from £5.3bn in 2025 to £5.6bn by 2028, £5.92bn by 2031 and £6.3bn by 2035. A lower growth scenario has also been included to show the likely risk if the region does not address existing structural barriers. A stretch scenario shows the potential upside if delivery is accelerated.

The central trajectory is underpinned by two linked shifts in performance. First, the region will need to increase overnight visitors by 50%, from around eight million to around 12 million by 2035. Secondly, total visitor spend will need to increase by 50%, from £5.48bn to approximately £8.22bn.

Whilst direct visitor economy GVA is the headline measure of economic growth, it is influenced by a range of factors beyond visitor demand alone, including productivity, investment, business performance and supply chain activity. The projected increases in overnight stays and visitor expenditure should therefore be viewed as the underlying market shifts required to support the Growth Plan ambition, rather than direct proxies for GVA growth.

The framework's priorities are designed to act together: investment in visitor infrastructure, accommodation, product and experience will create stronger reasons to stay; coordinated domestic and international market activity will improve conversion and raise the region's profile; workforce and skills interventions will improve productivity and progression; transport and connectivity improvements will support visitor distribution and dwell time; and the regional data hub will allow partners to target investment and monitor performance more effectively.

In practice, additional visitor spend will also generate indirect and induced benefits through the wider regional economy, including local supply chains, food and drink producers, transport providers, retail, construction, professional services and employment income. These wider effects are not included in the direct GVA trajectory in Figure 6.1, but they are important to the overall economic impact.

The trajectory will be reviewed annually through the Visit East Midlands performance framework.

6.1 Growth Trajectory

Table 2: Growth Milestones

Milestone year	Constrained growth	Core Growth Plan trajectory	Stretch trajectory
2025	£5.30bn	£5.30bn	£5.30bn
2028	£5.45bn	£5.60bn	£5.70bn
2031	£5.62bn	£5.92bn	£6.20bn
2035	£5.85bn	£6.30bn	£6.70bn

This is a policy-led growth trajectory showing the level of performance improvement required if the framework is successfully delivered.

The growth rate therefore accelerates slightly towards the later years, because many of the interventions in the framework will take time to come on stream and deliver benefits. This is reflected by the narrative that growth is assumed to come from successful delivery of the five priorities working together.



7. Governance and Delivery – How We'll Work Together to Make it Happen

The Visit East Midlands partnership provides the essential regional underpinning for the Visitor Economy framework, establishing a coherent system of governance, partnership working and delivery.

It's the system leader for the regional visitor economy, bringing together strategic direction, coordinated delivery and sector engagement at scale. It provides the mechanism through which local delivery is aligned within a shared framework.

At the heart of this model is an integrated governance structure that brings together public and private sector partners. At the strategic level, the Visit East Midlands Advisory Board provides independent, sector-led insight and challenge, shaping ambition and ensuring that the visitor economy is positioned effectively as a high-growth sector. This is complemented by the Strategic Partnership Board, which acts as the core delivery and coordination mechanism. Bringing together senior officers from constituent authorities alongside the region's LVEPs and DMOs, this Board provides a forum for coordinating activity and ensuring shared accountability for delivery across organisational boundaries.

The partnership will be fully realised through the creation of the Visit East Midlands Regional Network, which will provide a broad and open platform for engagement with the wider sector. By bringing together businesses, cultural organisations, destinations, education providers and delivery partners, the Network will ensure that the framework remains grounded in real market intelligence and lived experience. It will enable a two-way flow of insight informing policy, investment and programme design, and ensuring that priorities, opportunities and challenges are jointly shared and understood.

Partnership opportunities will be identified and maximised across the private, public and third sectors to support the delivery of the strategic priorities e.g. working with an airline and airport on an inbound marketing campaign.

7.1 Investment

The EMCCA Board has committed in both 2026-27 and 2027-28, £0.3 million for regional visitor activities and events and £0.3 million of support towards the core costs for the key delivery organisations Visit Derby, Visit Nottinghamshire and Visit Peak District and Derbyshire. Longer-term funding from April 2028 will be considered through the EMCCA budget-setting process.

In addition, £2.4 million has been allocated over three years from the Local Growth Fund Programme. Subject to business cases, this investment will support the initial delivery of the strategic priority interventions.

Over £15m has been committed or allocated to the sector through the Capital Investment Fund. This includes redeveloping Newark Castle and Gardens, revitalising Nottingham's iconic market square, renovating Chesterfield's Stephenson Memorial Hall as a vibrant cultural space, and unlocking Peak Resort as the first national park gateway resort.

The Board has also agreed for EMCCA and Derbyshire County Council to work together to bring the Grand Depart for the Tour de France Femmes to Derbyshire in 2027, committing up to £2.4 million to deliver the key stage in the world's biggest free women's sports event.

In addition, EMCCA is supporting the development of the Mini Switzerland pilot in the Peak District, which will test innovative approaches to strengthening the visitor offer and supporting sustainable tourism. Investment will be developed to unlock Nottingham Forest's City Ground development and catalyse the Trent Sports District, a major regeneration programme that will drive sports tourism.

Further opportunities to invest in visitor economy assets will also be considered through the ongoing development of EMCCA's investment pipeline.

A further opportunity to secure long-term funding comes from the potential adoption of an Overnight Visitor Levy (OVL). The Government announced in November 2025 its intention to give Mayors powers to establish overnight visitor levies, confirmed in the King's Speech in May 2026 that the legislation would be introduced, and concluded a national consultation in September 2026. Several steps are now needed nationally and locally to bring a levy forward.

No decision has been made to introduce an OVL in the East Midlands. It would be for the Mayor, working with the visitor economy sector including the Visit East Midlands Advisory Board and subject to appropriate decisions by the EMCCA Board, to consider whether to adopt a levy and how any revenue should be invested in regional priorities.

Any scheme would be shaped through engagement and consultation with businesses, local authorities and other stakeholders, ensuring that the needs of the business collecting the levy are central to the scheme design.



8. Monitoring and Evaluation

The approach is aligned to the five Strategic Priorities, ensuring that all interventions are directly contributing to the structural changes required.

Activity will be organised around a small number of priority intervention areas, each with clearly defined outputs, outcomes and accountable leads.

Monitoring and evaluation are embedded from the outset. A structured performance framework has been established, aligned to Growth Plan and local growth fund targets and outputs, underpinned by the regional data hub (see appendix 1 – Performance Monitoring Framework). This will provide a consistent, shared evidence base across partners, enabling real-time tracking of key indicators such as overnight stays, visitor spend, productivity, market mix and spatial distribution.

Delivery will be overseen through the Visit East Midlands governance structure. The Strategic Partnership Board will coordinate programme implementation and alignment across partners, while EMCCA's Programme Management Office will provide performance assurance, risk management and reporting discipline. Progress will be reported annually to the Visit East Midlands Advisory Board, ensuring transparency, accountability and ongoing strategic challenge at a regional level.



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Appendix: 1 Performance and Monitoring Framework

Strategic Priority	Intervention Theme	Timing	How the Intervention Delivers the Priority	Key Outputs	Key Outcomes
1. Visitor Infrastructure, Product and Experience	Develop high-value products, experiences and itineraries	Short → Medium → Long	Pipeline of experience-led product development focused on increasing dwell time, spend and repeat visitation; progression from pilots to scalable, bookable offers aligned to target markets	New and enhanced visitor products; bookable itineraries; product clusters; innovation pilots	Increased overnight stays; higher spend per visit; improved yield and GVA contribution
	Strategic asset development and capital pipeline	Medium → Long	Structured development and packaging of priority assets (heritage, sport, landscape, events) into cohesive multi-day propositions	Priority asset investment pipeline; enhanced infrastructure; integrated destination offers	Improved conversion from awareness to visits; stronger economic contribution from anchor assets
	Accommodation growth and market shaping	Medium → Long	Targeted interventions to unlock hotel and non-serviced capacity, address viability gaps, and align supply with market demand	New accommodation developments; planning alignment; investment propositions	Increased staying capacity; higher-value visitor mix; year-round demand growth
2. Growing Inbound and Domestic Markets	Regional marketing and brand development	Short → Medium → Long	Coordinated campaigns aligned to priority segments, product clusters and national strategy; shift from fragmented to unified regional approach	Regional campaigns; brand toolkit; CRM development; partner alignment	Increased intent to visit; stronger place attribution; improved conversion rates
	Trade readiness and routes to market	Short → Medium → Long	Structured programme to support SMEs in distribution, pricing and packaging; scaling into sustained international trade engagement	Increased number of trade-ready businesses; participation in trade missions; route-to-market partnerships	Growth in international visitors; higher-value bookings; improved market conversion
	Business tourism and events growth	Short → Medium → Long	Coordinated bidding, pipeline development and alignment with accommodation and transport to drive higher-spend, mid-week demand	Event pipeline; successful bids; strengthened conference offer	Increased business tourism; longer stays; off-peak demand growth

Strategic Priority	Intervention Theme	Timing	How the Intervention Delivers the Priority	Key Outputs	Key Outcomes
3. Workforce, Skills and Opportunity Escalator	Centre for Excellence and Opportunity (CfEO)	Short → Medium → Long	Establish distributed skills network linking employers, providers and public agencies to deliver structured career pathways and in-work progression	Skills programmes; accredited pathways; employer partnerships; leadership training	Improved workforce retention; higher productivity; clearer progression routes
	Workforce inclusion and progression	Medium → Long	Embed Opportunity Escalator principles across the sector to improve accessibility, progression and job quality	Increased participation across skill levels; inclusive recruitment initiatives	Greater social mobility; improved job quality and sector perception
4. Access, Connectivity and Visitor Distribution	Integrated visitor transport and connectivity	Medium → Long	Align transport investment with visitor economy priorities to improve access, connectivity and dispersal (including rural and first/last mile solutions)	Improved transport links; pilot schemes (e.g. DRT, active travel routes); integrated itineraries	Increased visitor distribution; reduced congestion; improved visitor experience
	Sustainable access and visitor management	Medium → Long	Implement measures to reduce car dependency and manage demand in high-pressure destinations	Park & ride schemes; low-carbon transport initiatives; visitor management plans	Reduced environmental impact; improved place sustainability and community outcomes
5. Data and Insight (Underpinning Priority)	Regional data hub and insight platform	Short → Medium	Develop a single, shared data infrastructure to aggregate, analyse and share visitor economy intelligence across partners	Live dashboard; shared datasets; regional data standards; partner data agreements	Improved decision-making; consistent performance tracking; stronger evidence base
	Performance monitoring and evaluation framework	Short → Medium → Long	Establish baseline, KPIs and continuous monitoring aligned to Growth Plan targets and sector priorities	KPI framework; annual reporting; evaluation cycles; programme dashboards	Clear accountability; improved ROI; ability to refine and scale interventions
	Data-led investment and market optimisation	Medium → Long	Use insight to target high-value segments, optimise campaigns and inform investment decisions	Insight-led campaigns; targeted market programmes; investment prioritisation tools	Increased productivity; stronger return on public investment; scalable growth model

Performance and Monitoring

The Performance and Monitoring Framework set out below provides a structured and consistent approach to measuring performance across the visitor economy, linking delivery activity directly to economic outcomes. By combining a small number of headline indicators with a broader set of supporting metrics, the framework enables both strategic oversight and operational management. It ensures that all partners are aligned around a shared definition of success focused on increasing value, productivity and inclusive growth—while providing the evidence base required to refine interventions, demonstrate return on investment and support ongoing decision-making.

Headline Outcome KPIs (Board-Level)

KPI	Measure	Baseline	2035 Direction	Reporting	Lead
Visitor economy GVA	Total GVA contribution (£bn)	c. £5.3bn value / £7.2bn GDP	↑ +£1bn GVA growth	Annual	EMCCA
Total visitor spend	£ total visitor expenditure	£5.48bn	↑ +50%	Annual	EMCCA / VEM
Overnight visits	Volume of overnight trips	~8 million	↑ +50%	Annual	VEM
Average spend per trip	£ per visit	Benchmark (STEAM/VB data)	↑ Increase (real terms)	Annual	EMCCA
Length of stay	Nights per visit	c. 2.7–3.3 nights (varies by area)	↑ Increase	Annual	VEM
International market share	% of total spend from inbound visitors	Low relative share	↑ Increase	Annual	VEM
Sector productivity	GVA per worker	c. £46k	↑ Increase	Annual	EMCCA
Employment (quality-adjusted)	Jobs + progression indicators	~55,700 FTE	↑ Higher-value jobs	Annual	EMCCA

Supporting Delivery KPIs

Priority 1: Infrastructure, Product and Experience

KPI	Measure	Direction	Frequency	Lead
Accommodation capacity growth	Net additional rooms/units	↑ Increase	Annual	EMCCA
Occupancy rates	% occupancy across sectors	↑ Optimise	Quarterly	Industry / VEM
Product pipeline	Number of bookable experiences	↑ Increase	Quarterly	VEM
Major asset development	Progress against priority capital projects	→ Milestone-based	Quarterly	EMCCA

Priority 2: Markets (Domestic and International)

KPI	Measure	Direction	Frequency	Lead
Campaign conversion	Click → visit / booking rates	↑ Improve	Campaign cycle	VEM
Brand awareness	Recognition and intent to visit	↑ Increase	Annual	VEM
Travel trade readiness	Number of export-ready businesses	↑ Increase	Annual	VEM
Business tourism value	£ from conferences/ events	↑ Increase	Annual	VEM

Priority 3: Workforce, Skills and Opportunity Escalator

KPI	Measure	Direction	Frequency	Lead
Skills participation	Individuals trained (L2–L7)	↑ Increase	Quarterly	EMCCA
Workforce retention	Staff turnover rates	↓ Reduce	Annual	Employers / EMCCA
Progression rates	% advancing roles/wages	↑ Increase	Annual	EMCCA
Employer engagement	Participation in CfEO network	↑ Increase	Annual	EMCCA

Priority 4: Access, Connectivity and Distribution

KPI	Measure	Direction	Frequency	Lead
Visitor distribution	% of visits outside hotspots	↑ Improve balance	Annual	EMCCA / VEM
Sustainable transport use	% using public/ active travel	↑ Increase	Annual	EMCCA
Seasonal balance	Off-peak vs peak visits	↑ Improve	Annual	VEM
Journey satisfaction	Visitor transport satisfaction scores	↑ Improve	Annual	VEM

Priority 5: Data and Insight (Underpinning)

KPI	Measure	Direction	Frequency	Lead
Data hub adoption	Number of active partner users	↑ Increase	Quarterly	VEM
Data coverage	% of region with consistent datasets	↑ Increase	Annual	VEM
Investment ROI	£ return per £ invested	↑ Increase	Annual	EMCCA
Evidence-based decisions	% of programmes using data insight	↑ Increase	Annual	EMCCA

Delivery of this framework will be underpinned by the regional data hub with data architecture that combines national datasets (e.g. ONS, VisitBritain), established regional models (e.g. STEAM), and new real-time data sources (e.g. mobile location and payment data).

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