

## **Draft East Cambridgeshire Tourism Strategy**

### **Forward**

I am pleased to present the East Cambridgeshire Tourism Strategy which outlines the Council's commitment to ensuring that the value of tourism is recognised and that its economic value is maximised for the benefit of the entire district.

The strategy draws upon the many strengths and assets of the district's diverse and unique tourism offer and seeks to deliver outcomes that will ensure that the benefits of tourism are seen by visitors, businesses and residents.

Extensive primary and secondary research has been carried out to inform the development of this strategy which is vital to meeting the needs of a wide variety of stakeholders.

The launch of this strategy and its associated outcomes endorse the Council's commitment to making East Cambridgeshire a fantastic place to live and visit.

Councillor David Ambrose-Smith  
Chairman of Community Services

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## **Introduction**

The District Council aims to ensure that East Cambridgeshire is a fantastic place to live, work and visit, so much so, that it is listed as a priority in the Council's Corporate Plan 2017-2019. In order to achieve this goal, the Council has identified a number of actions that will directly improve the lives of residents, businesses and visitors.

The Council recognises that East Cambridgeshire has something for everyone, and therefore has developed the East Cambridgeshire Tourism Strategy that has drawn upon all of the components that make up the area's unique tourism offer and identifies outcomes that will benefit the entire district.

The strategy will outline the current state of tourism in East Cambridgeshire and will identify how the Council will support the sector for the benefit of a wide range of stakeholders.

Extensive research has been conducted to ensure that the needs of the whole district have been considered which has informed how to most effectively and sustainably maximise the benefits of tourism. The research found that East Cambridgeshire is perceived to have a number of key attributes for different visitor types including horse sport and culture, strong National Trust estate, heritage and historic architecture and the outdoors and unspoilt nature. More than two thirds of visitors interviewed arrived as part of a group (including immediate family), with more than half of all visitors make their way homewards after leaving their current location. The highest spending visitors were those that travelled the furthest to get here and there is no predominantly recognised name for the East Cambridgeshire area.

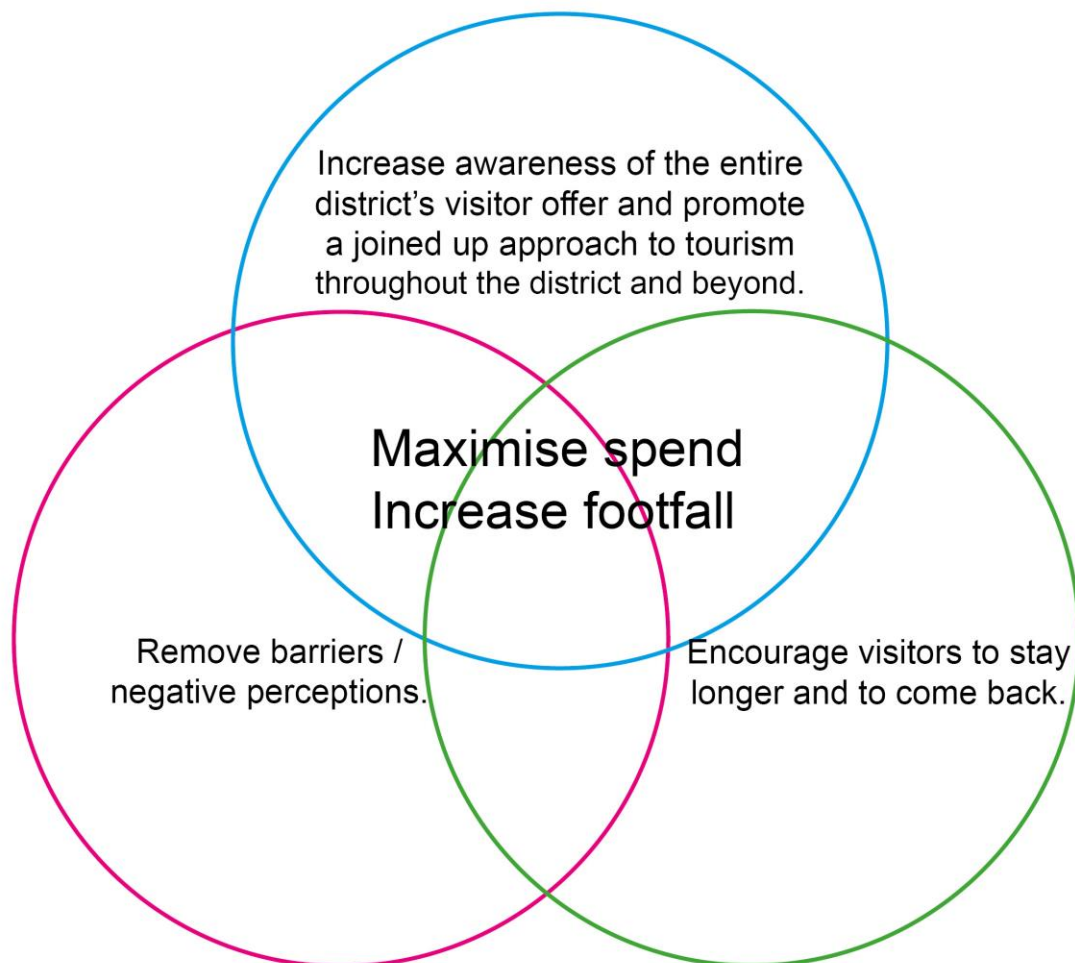
The strategy has considered the research findings and the plan of how the Council proposes to address them is outlined in the Implementation section.

## Strategic Outcomes

The District Council recognises the value of tourism to the entire district and has developed this Strategy which seeks to deliver the following aims:

1. Maximise visitor spend for the benefit of local businesses and communities;
2. Increase the footfall and spread of visitors across the district.

The Council will seek to achieve the aims of the strategy through three interdependent objectives, illustrated below:



## National and Regional Context

Tourism is currently worth £127 billion to Britain's economy<sup>1</sup>, and is forecast to be worth over £257 billion by 2025.<sup>2</sup> Tourism is Britain's seventh largest export industry and is the fastest growing sector in the UK in employment terms. It accounts for 9.6% of all employment and 9% of GDP. 39.2 million overseas visitors came to the UK in 2017 and spent £24.5 billion.<sup>3</sup> In 2017, England received 34,304,000 visitors spending £21,360,000.<sup>4</sup>

In 2010, Visit England published their strategy 'England: A Strategic Framework for Tourism 2010-2020' which set out the following four objectives:

- To increase England's share of global visitor markets
- To offer compelling destinations of distinction
- To champion a successful thriving tourism industry.
- To facilitate greater engagement between the visitor and the experience.

It is important that this strategy recognises the aspirations of VisitEngland to understand where resources will be focused at a national level for the benefit of the whole country, and to understand where we can potentially add value to these efforts by aligning our own ambitions.

The In 2017, the value of tourism for the East of England is £6.4 billion<sup>5</sup>. Cambridgeshire Economic Impact of Tourism report 2013 states that there were 23,943,000 trips in Cambridgeshire in 2013, (90% of trips were day trips). Day trippers spent £820,425,000 compared to visitors that stayed overnight who spent £492,995,000. The report states that "most spend by staying visitors occurs in the accommodation, shopping and food and drink sectors, whilst day trippers spend most on shopping and food and drink". 52% of staying visitors were on holiday, 26% were on visits to friends and relatives and 18% were on business trips. The report advises that the impact of day visitor spend is relatively greater than stay visitor spend in turnover terms.

In January 2017, an Industrial Strategy green paper was published by the Government. Following this, it was agreed at the Tourism Industry Council that the tourism sector would develop a bid for a tourism sector deal that would provide a one-off opportunity for tourism to be recognised as an industry of the future, competing globally and backed by Government. The bid is being facilitated by VisitBritain (the name used by the British Tourist Authority) who is helping the industry-led working groups develop proposals for the final submission.<sup>6</sup>

The Cambridgeshire and Peterborough Combined Authority is developing a local Industrial Strategy and are working with Visit Cambridge and a range of local tourism stakeholders to

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<sup>1</sup> <https://www.visitbritain.org/visitor-economy-facts>

<sup>2</sup> <https://www.visitbritain.org/sector-deal-uk-tourism>

<sup>3</sup> <https://www.visitbritain.org/visitor-economy-facts>

<sup>4</sup> <https://www.visitbritain.org/2017-snapshot>

<sup>5</sup> Figures provided by VisitEngland (September 2018)

<sup>6</sup> <https://www.visitbritain.org/industrial-strategy-tourism>

include a collaborative approach to tourism to achieve the area's ambitions for a stronger visitor economy.

## Tourism in East Cambridgeshire

East Cambridgeshire receives around 4 million visitors per year. There are 271,600 overnight trips and 3.76 million day trips to the district per year. The total visitor spend of both day visitors and overnight tourism is £172 million. The total value of tourism for the district is over £201 million. There are 4,350 tourism related jobs in East Cambridgeshire (this equates to 9.3% of all employment)<sup>7</sup>.

Inbound visitors to the district has dramatically increased, between 2010 and 2016, the number of international visitors to Ely increased from 7,000 to 18,000.<sup>8</sup>

### Mapping of the Current East Cambridgeshire Tourism Offer

In July 2018, the Council carried out a mapping exercise to establish the area's current tourism offer. The exercise included the mapping of tourism related businesses (attractions, eateries, public houses, accommodation providers).

Key observations from mapping exercise<sup>9</sup>:

- There are 30 visitor attractions in East Cambridgeshire.
- There are 4 larger attractions located just across the district's border.
- There are 100 public houses, bars and eateries in East Cambridgeshire
- There are 53 accommodation providers in East Cambs ranging from bed and breakfasts, campsites and hotels.
- 43% of all attractions, 47% of all public houses, bars and eateries are located in Ely. The district's accommodation is clustered in Ely (30% of all accommodation) however is sparsely spread throughout the rest of the district.
- There are 11 public houses and 4 accommodation providers in the lower south east of the district. Those public houses and accommodation providers could benefit from attractions located just across the district's border, especially visitors to Newmarket Racecourse and the National Heritage Centre for Horseracing and Sporting Art.
- Soham has 2 visitor attractions, 10 public houses, bars and eateries and 1 accommodation provider.
- Littleport has 1 attraction, 4 accommodation providers, and 5 public houses, restaurants and eateries. The accommodation, public houses and restaurants in Littleport could benefit from visitors to Welney Wetland Centre (located in West Norfolk), directly connected by the A1101.
- Burwell has 1 attraction, 5 public houses, restaurants and eateries and 2 accommodation providers. Burwell is centrally between 3 of the 4 most popular visitor attractions (Newmarket Racecourse, Anglesey Abbey and Wicken Fen).

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<sup>7</sup> Economic Impact of Tourism - East Cambridgeshire 2016

<sup>8</sup> [https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/detailed\\_towns\\_data\\_2010\\_-\\_2016.xlsx](https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/detailed_towns_data_2010_-_2016.xlsx)

<sup>9</sup> Figures illustrated are approximations taken from a particular point in time using secondary information.

## Commissioned Research

In the summer of 2018, a team of researchers were commissioned by the Council to conduct primary research at key visitor destinations throughout East Cambridgeshire and the immediate surrounding area.

## Objectives of Research

The research sought to identify key information necessary for the planning and development of the Tourism Strategy, as detailed below:

Profile of Current East Cambs Tourists	<ul style="list-style-type: none"><li>• Demographics</li><li>• Where they come from</li><li>• Group types and sizes</li><li>• Visiting habits, preferences and expectations</li><li>• Spending habits and reaction to entry prices</li><li>• Accommodation, eating and drinking habits</li><li>• Reaction to stimuli (advertising, promotions, co-promotions)</li><li>• Knowledge of East Cambs places and attractions</li><li>• Preferred attractions outside East Cambs</li></ul>
Gaps in the current visitor base	<ul style="list-style-type: none"><li>• How gaps might be addressed – gaps in visitor profile, where new visitors may come from, attracting new visitors</li></ul>

## Research Approach

800 visitors at key attractions were surveyed face to face using questionnaires. 44 depth interviews also took place at these locations to obtain a deeper understanding of the views of current visitors, probing especially their perceptions and reactions. The locations where engagement took place include Anglesey Abbey, Wicken Fen, Ely Market and historic city centre, Burwell Windmill and Rural Museum, Ely Cathedral, Stained Glass Museum, July Racecourse, Ely Riverside, National Heritage Centre, Ely Museum, Fenland Country Fayre and Welney Wetlands.

## Key Research Findings

### Visitor Types

Using ACORN's Lifestyle Profiling tool<sup>10</sup> that analyses significant social factors and behaviour, the majority of visitors to East Cambridgeshire identified as 'Executive Wealth' and 'Mature Money' (over 55, retired, and with accumulated wealth). The other most popular visitor segments were 'Striving Families', 'Steady Neighbourhoods' and 'Modest Means'. 22.2% of visitors surveyed were categorised as 'Affluent Achievers' who have lots of available spend.

The East Cambridgeshire area is perceived to have a number of key attributes different visitor types:

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<sup>10</sup> <https://www.gov.uk/government/publications/quality-assurance-of-administrative-data-in-the-uk-house-price-index/acorn-consumer-classification-caci>



- Horse sport and culture
- Strong National Trust estate
- Heritage and historic architecture
- Outdoors and unspoilt nature

Further to this, distinct groups of lifestyles types were identified linked to these attributes, which have been defined as follows:

Visitor Lifestyle Type	Description	Typical Visitor Lifestyle Profile
Horse sport Enthusiasts	These visitors mostly inhabit the upper reaches of the rural social set – though many also keep a base in London for professional reasons. They have the wealth to support large and extended families, and many of their horse related activities involve dependent children from the youngest years up to at least 30.	Successful professional families, plus thriving managers and tradespeople  Travelling by car  Live in the countryside (within one hour of East Cambs)  Refreshments provided at the premises
Culture Vultures	These people are fanatical about art and culture, especially English historic buildings and architecture. They thrive on making visits, usually as part of larger groups, to renowned attractions such as Ely Cathedral and Anglesey Abbey.	55+ years old  Male  Many retired  Travelling by Private Coach  Pub lunches and picnics
National Trust Groupies	Distinctive group whose visiting pattern is driven by their membership of the National Trust. They are delighted that membership gives them an opportunity to visit National Trust attractions across the UK, providing unlimited itineraries for day trips and even for longer trips involving overnight stays.	Retired couples Small family groups Travelling by car Genteel tea and cakes in the NT cafe
Nature Lovers	These visitors are attracted to East Cambs because they like tranquillity, natural settings, wildlife, and outdoor activity. They like to be active and especially to do things that are low cost, so are often found as walkers, and cyclists.	Younger people, many students and junior academics  Small groups / solo visitors  Travelling by bicycle and on foot  Flasks, sandwiches, picnics
Families	Family groups, especially parents with younger children, looking to give the family an enjoyable day out without breaking the bank. Events that are free to enter, especially if you can bring a picnic to avoid high catering costs, are an	Parents with young children  Financially stretched  Travelling by car

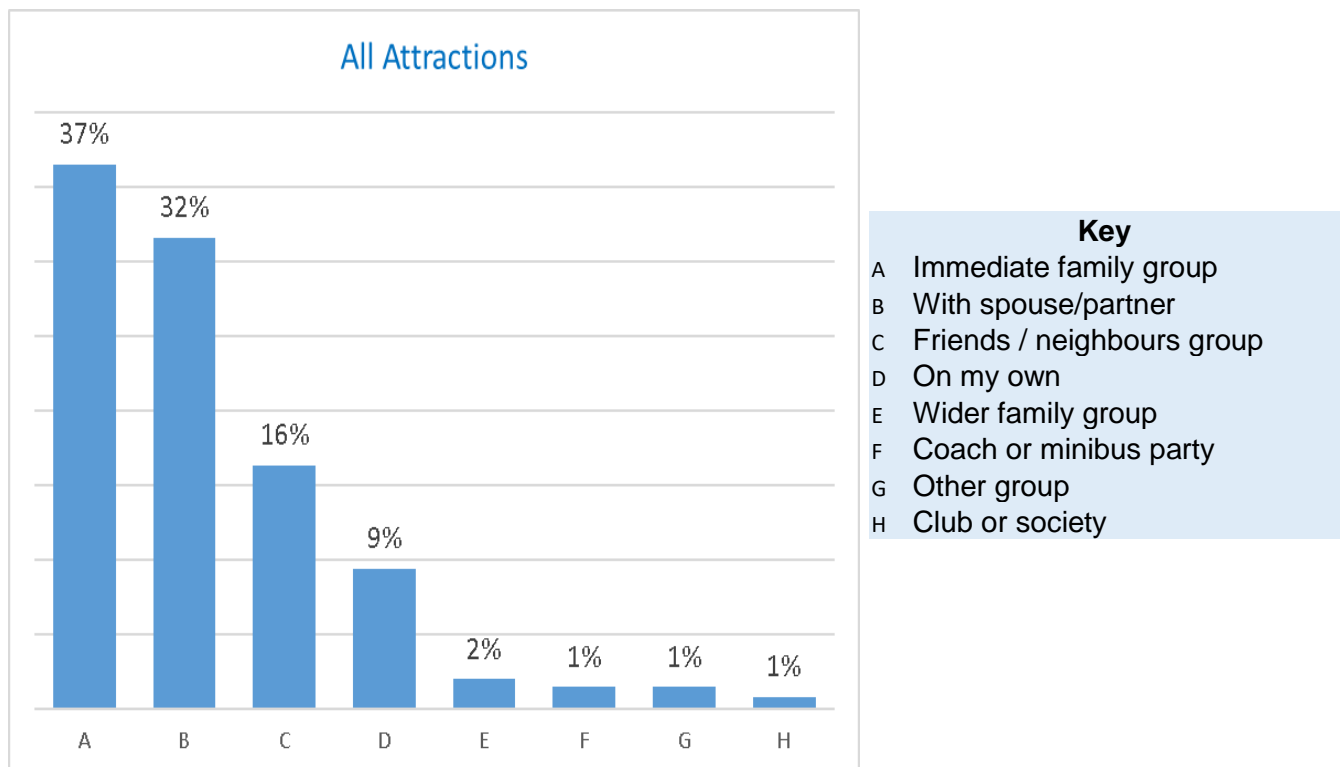
	attractive draw. Parents want to relax as well, so low cost events that provide something to entertain a range of ages are perfect.	Budget options, picnics
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Reasons for visiting East Cambs attractions

Forward planning and personal recommendation are the two main triggers for selecting where to go and what to do. This indicates a need for information about what is available, such as opening hours and entry fees.

Make-up of visitor groups

More than two thirds of visitors are arriving as part of a group including immediate family. 1% of visitors were a part of a coach or minibus party.



Graph illustrating the make-up of visitor groups

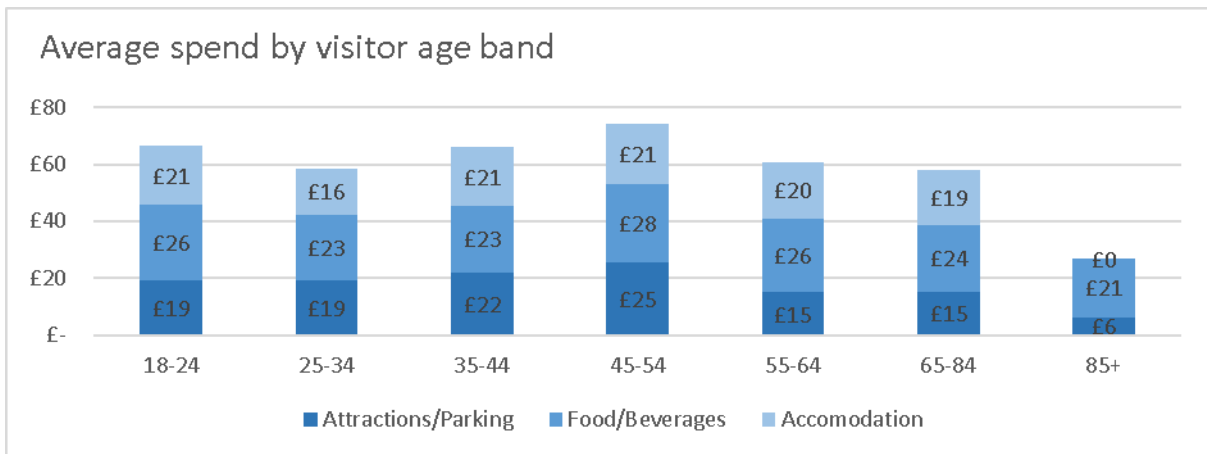
Visitors' post-attraction plans

More than half of all visitors make their way homewards after leaving their current location, rather than have something to eat or explore the area further. In Newmarket, two thirds of visitors make their way straight home after leaving their chosen attraction.

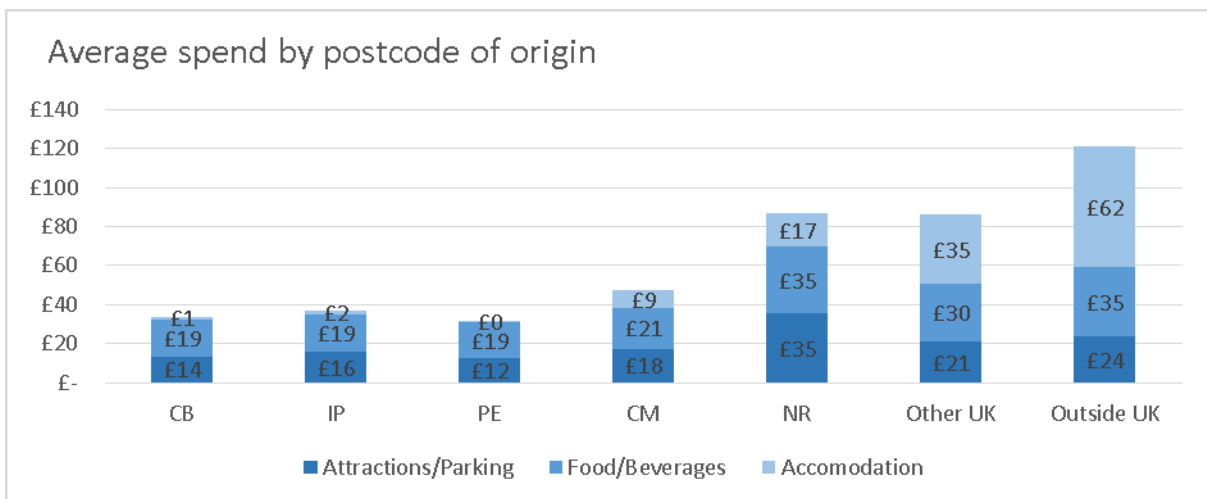
Visitor spend habits

Currently visitors to National Trust properties are modest spenders on food and beverage, with more than half (Wicken Fen) and more than a third (Anglesey Abbey) spending less than £10. At both Ely and Newmarket two thirds of visitors spend between £10 to £60, however at all attractions very few visitors spend more than £60 during their trip.

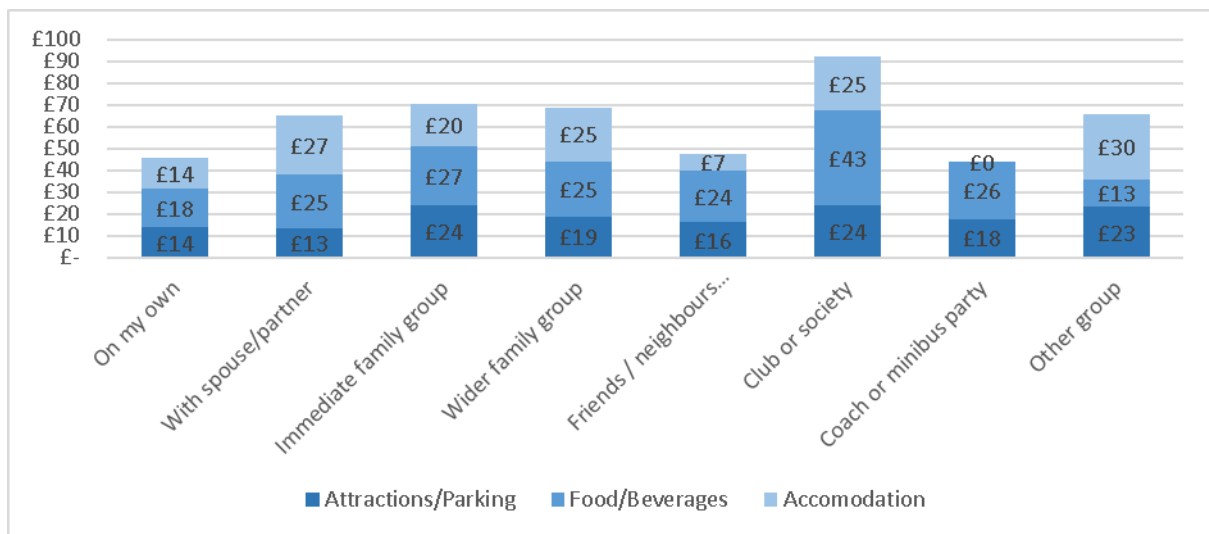
With the exception of gate fees, the highest spenders currently are the youngest type (18-24 years), and also the 45 to 54 age group, at the height of their earning power and with lower family expenses.



With the exception of visitors from the Norwich area, the district's most valuable visitors come from beyond East Anglia.



The highest spending visitors are those visiting as part of a club or society.



Visitors from beyond the immediate catchment spend twice as much as local visitors per visit. Overseas visitors constitute 8% of all visitors (during summer months) and are economically even more valuable.

#### Visitors' identification of the local area

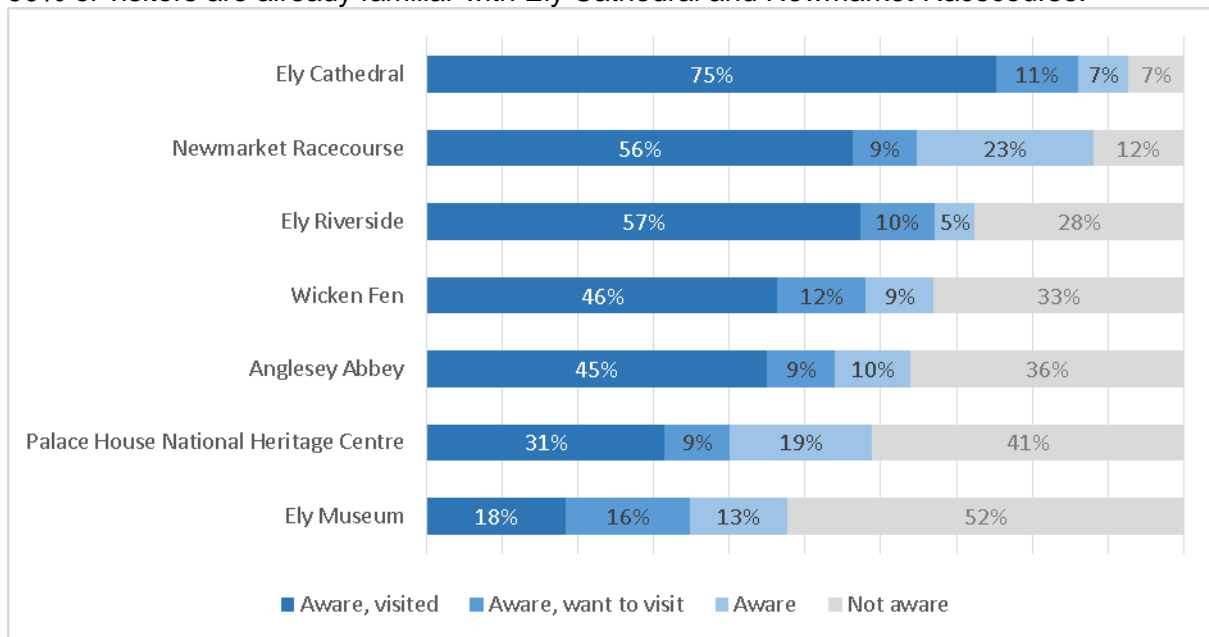
There is no predominantly recognised name for the East Cambridgeshire area. Visitors use a range of names to define the area, with only 1 in 50 using the name 'East Cambridgeshire'. 36% of visitors identified their location as 'Cambridgeshire' and 16% identified their location as 'Ely area.'

#### Overnight stays

At least during the summer months, overnight stays are an important contributor to the East Cambs tourism economy. Across all locations 1 in 5 visitors will stay over, with more than half spending more than £60 on accommodation. 4 out of 10 visitors that stayed overnight choose a traditional hotel.

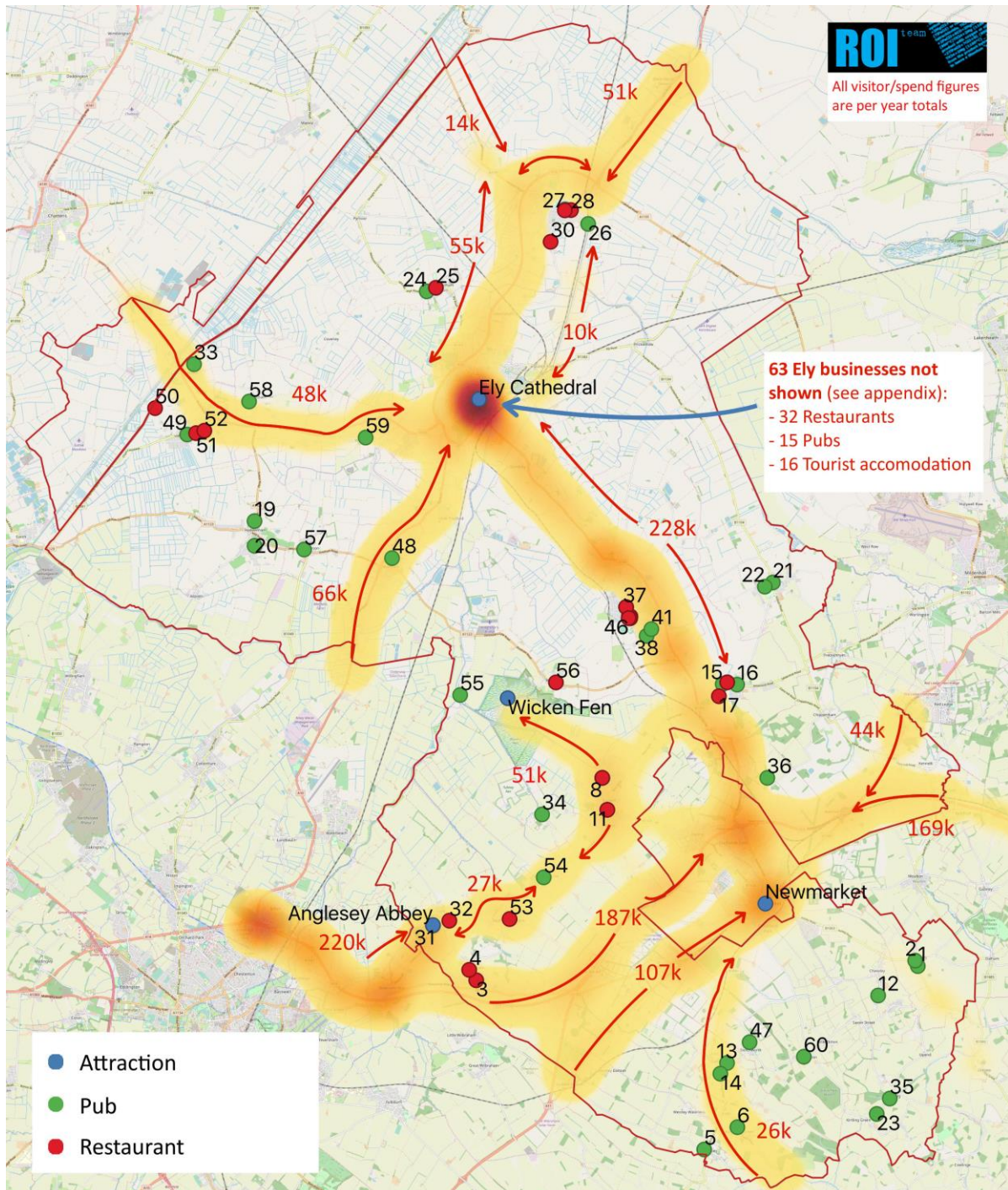
### Visitor awareness of East Cambs attractions

90% of visitors are already familiar with Ely Cathedral and Newmarket Racecourse.



## Tourist Flow

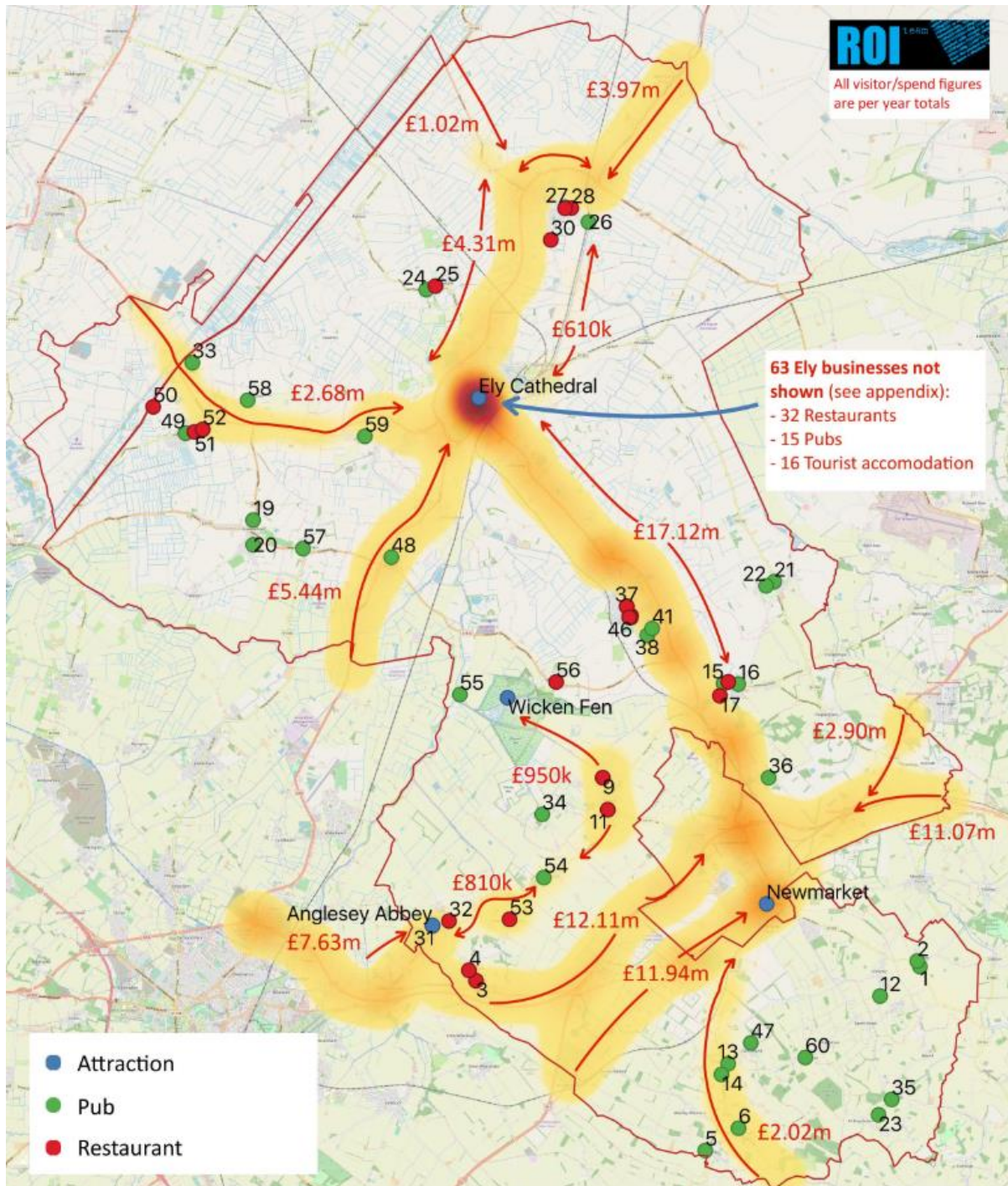
The map illustrates leisure and pleasure visitor trips into and around East Cambs with the shaded routes showing the most popular visitor routes identified by survey participants. The numbers in red indicate the number of tourists per year using that route. It can be seen that the strongest flow of visitors enters East Cambs from the South West (from the Cambridge area).





### Tourist Total Spend

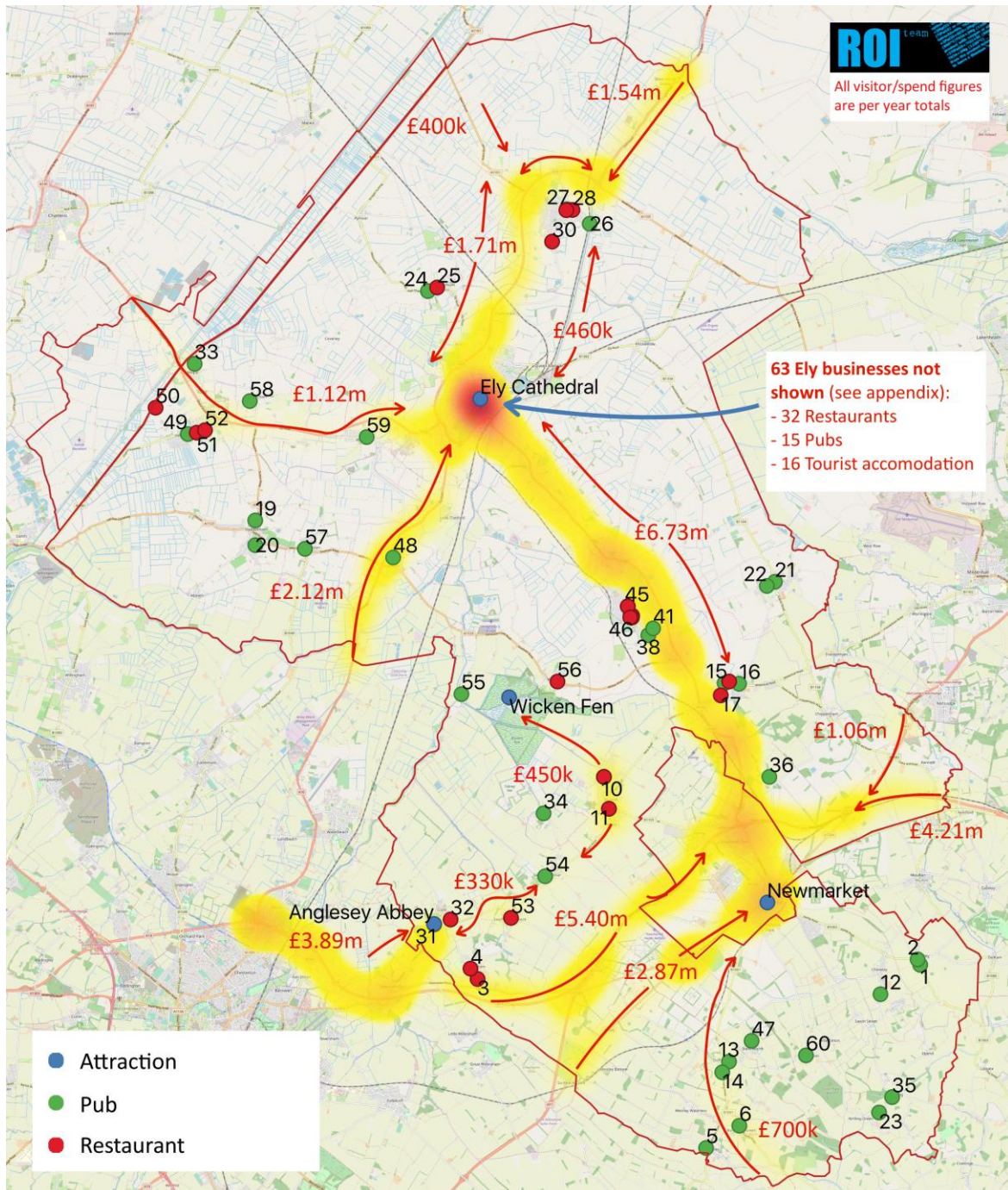
The map illustrates the aggregate of available visitor spend into and around East Cambridgeshire. The shaded routes show the volume of spend by leisure and pleasure tourists carried along the most used routes which is therefore available to be captured by tourism assets location adjacent to key routes. Figures in red show the amount of spend per year available along key routes identified by survey participants. Arrows show the direction from which spend enters East Cambridgeshire and then within East Cambridgeshire.



### Tourist Spend on Food & Beverage



The map illustrates the aggregate of available visitor Food & Beverage spend into and around East Cambs. The shaded routes show the volume of tourist Food & Beverage spend by leisure and pleasure tourists carried along the most used routes which is therefore available to be captured by tourism assets location adjacent to key routes. Figures in red show the amount of spend per year available along a key route. Arrows show the direction from which spend enters East Cambs and then within East Cambs.





## SWOT Analysis of the Current East Cambridgeshire Tourism Offer

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Variety and range of attractions, events and accommodation</li> <li>• Catchment includes large proportion of 'mature money'</li> <li>• Area perceived to be rich in historic architecture</li> <li>• High proportion of summer visitors plan to stay overnight</li> <li>• Over 100 public houses and restaurants</li> <li>• Strong Ely brand and tourism infrastructure. Ely is on existing tour itineraries with Ely Cathedral being a strong pull for visitors and tour groups</li> <li>• Independent and specialist shops and businesses</li> <li>• Area rich in wild countryside</li> <li>• Good train links to Cambridge, London, the Midlands, Stansted and the East</li> <li>• Tranquil countryside provides good country cycling and walking</li> <li>• Recent visitors research findings available</li> <li>• Free Car Parking at some key visitor destinations</li> <li>• Established and popular market in Ely providing a variety of themes (Vegan Fairs, Continental Markets)</li> <li>• High National Trust membership provides framework for building visiting programmes</li> </ul>	<ul style="list-style-type: none"> <li>• Visitor perception of distances</li> <li>• Lack of joined up partnership working</li> <li>• Area lacks a clear identity and label</li> <li>• Cambridge seen as the indispensable anchor of the area</li> <li>• Weak knowledge of attractions and food and beverage premises and what they offer</li> <li>• Many National Trust members see no reason to stray beyond the National Trust network</li> <li>• Of dominant visitor types, few are natural spenders – some can't and some won't</li> <li>• More than half of existing visitors visit only one attraction and then make their way home</li> <li>• Lack of large scale conference and event venues for business tourism</li> <li>• Weak mobile phone coverage in some areas</li> <li>• Numerous brands providing a service to visitors</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Development of a joined up, effectively marketed district package</li> <li>• Huge bank of Cambridge visitors on the doorstep looking to extend their visit</li> <li>• Influence large numbers of potential visitors via tour organisers and society tours</li> <li>• Actively recruit more lucrative visitors from outside the area</li> <li>• Emergence of new, unique attractions</li> <li>• Potential Tourism Sector Deal which could see the emergence of</li> </ul>	<ul style="list-style-type: none"> <li>• Perception that prices for entry and food and beverages are too high</li> <li>• Nearby tourist locations (especially Cambridge) have stronger awareness and identify</li> <li>• Fragmented and disjointed product</li> <li>• Some organisations may be reluctant to engage and collaborate</li> <li>• Strong culture of self-catering tourism (e.g. picnics and budget day trips)</li> <li>• Economic crisis or slow down</li> <li>• Desire and ability of some businesses to embrace technological developments</li> <li>• Unpredictable British weather –</li> </ul>

<p>Tourism Zones</p> <ul style="list-style-type: none"><li>• Opportunities for tourism interventions through the Combined Authority's local Industrial Strategy</li><li>• Improvements to mobile phone and Internet coverage</li><li>• Co-promotional opportunities</li><li>• Capitalise on event footfall</li></ul>	<p>seasonality</p> <ul style="list-style-type: none"><li>• Competition from other destinations where children go free</li><li>• Competition from overseas (budget airlines)</li><li>• Desire and ability to embrace new market trends (e.g. Airbnb)</li></ul>
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## Implementation

This strategy will be driven and monitored by the District Council, however its success will be dependent on effective collaboration from a range of partners and its approach adopted by tourism stakeholders.

This section outlines how specific areas of focus could achieve the three strategic objectives.

Strategic Objective	Areas of Focus	How the Areas of Focus could be implemented
<p>Increase awareness and promote a joined-up approach</p>	<p>Research findings suggest that there is a lack of awareness of various aspects of East Cambridgeshire's tourism product. A joined up approach could improve the visibility of unknown aspects of the district's tourism offer and improve the accessibility of information required for visitors to explore other areas that they are currently unaware of.</p> <p>The development of co-promotional opportunities between providers with an ethos on helping each other could be encouraged, this may be in the form of discounted rates and special offers that could entice visitors to visit other places that they wouldn't have otherwise done so.</p> <p>The development of a district wide brand could be used by providers as a recognisable and credible common link, making use of associated tags/hashtags.</p> <p>The development of visitor packages tailored to enhance the appeal of East Cambridgeshire to existing and new visitors, taking into consideration gaps in existing visitor profiles could be explored.</p> <p>Visitors from beyond the immediate catchment spend twice as much as local visitors per visit. Overseas visitors constitute 8% of all visitors (during summer months) and are economically even more valuable. Promotion of the area to these more distant visitors could be implemented alongside local and national promotion.</p>	<p>The recommendations listed below have been carefully considered to add value to existing visitor provision and to provide an effective, joined-up approach for the benefit of the entire district.</p> <p>The development and launch of a new tourism website for the whole of East Cambridgeshire would enable the areas of focus identified within the strategy to be implemented and would seek to complement existing services by way of signposting. The website would seek to add value to existing provision and will seek to fill gaps, being mindful of what else is out there so not to replicate or duplicate.</p> <p>Specific areas of focus that a new district wide tourism website could address include the promotion of the entire East Cambridgeshire tourism offer; the promotion of basic visitors needs such as transport options, car</p>
<p>Remove barriers</p>	<p>By being aware of gaps in the current visitor base e.g. gaps in age profile, we</p>	

<p>and negative perception</p>	<p>could tailor marketing efforts and showcase what East Cambridgeshire has to offer for these groups with the intention of attracting them to the district.</p> <p>There are essential facilities and services that people need when visiting somewhere that are not always promoted or accessible, such as toilets, baby changing facilities, petrol stations, accessibility information, car parks, cyclist friendly public houses, dog and child friendly public houses and restaurants. Promotion of these basic visitor needs would make life easier for visitors and may encourage them to take a trip to somewhere they otherwise may not have. Basic needs could be illustrated using a system of symbols. Appropriate and up-to-date visitor information could be encouraged such as sample menus, details of surrounding amenities, seating areas, prices and Wi-Fi provision.</p> <p>Promoting the range of experiences, attractions, accommodation types and other components of the district's tourism offer is likely to widen the area's appeal, and raise awareness of elements of the district that may be unknown to some groups e.g. promotion of luxury and unique accommodation, nighttime industry, that may have not been apparent.</p> <p>The promotion of events, markets and festivals throughout the year would demonstrate that the area is a year round destination. The promotion of events may attract niche audiences into the district that may not have previously considered visiting e.g. Vegan Markets, park runs, cycle race events. There may be opportunities for local businesses to capitalise on the visits of niche markets and tailor services to meet the needs of these groups, which may encourage repeat business.</p> <p>It is important to recognise the strengths and assets of neighbouring areas and to understand their ambitions as there may be opportunities to explore collaborative working that could add value to achieving the aims of this strategy. A joined up approach to establishing a wider visitor package could raise awareness of the area to visitors that may not usually have considered a trip here. Visitors may be more inclined to visit if they are initially drawn to</p>	<p>parking, petrol stations and cyclist friendly public houses; mapping tools to illustrate travel times and distances; and tailored packages orientated to specific groups e.g. East Cambridgeshire for historians, cyclists, families, walkers and boaters.</p> <p>The website could promote special offers and incentives between tourism providers enticing visitors to stay longer and visit places they may not have otherwise. The website could be used to promote elements of district's tourism offer that appeals to gaps in the current visitor base.</p> <p>Public houses, accommodation, restaurants and eateries could feature prominently on the website. Links to other websites would create opportunities for online booking and access to further information.</p> <p>The development of a strong, recognisable district wide brand could be used to unify the entire East Cambridgeshire visitor package, emphasising that the whole district forms part of the offer. The branding could be used on marketing materials by stakeholders as a show of partnership ethos and collaboration.</p>
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	<p>neighbouring areas and learn that there is something of interest in East Cambridgeshire. Visitors may also stay longer as they become aware of what more there is to see and do in the wider area.</p> <p>There is a perception that components of the district's tourism product are too far to travel, therefore there may be an opportunity to utilise visual aids to illustrate travel distances/times.</p>	<p>Engagement with neighbouring areas and other organisations to understand their aspirations and to provide opportunities to explore ways of adding value to the East Cambs and wider visitor offer and how working collaboratively could achieve a stronger visitor economy.</p> <p>An Action Plan (Appendix i) has been developed that outlines how the District Council will implement the Areas of Focus detailed in this section.</p>
<p>Encourage visitors to stay longer and to come back</p>	<p>The development and promotion of longer term visitor passes e.g. annual passes which are value for money (whether joint or individual) may encourage repeat business.</p> <p>The promotion of events, markets and festivals throughout the year may encourage people to come back to the area if something is going on that appeals to them, when they have not have considered to do so otherwise. Information regarding events, markets and festivals can be promoted and also shared to businesses to capitalise on event footfall (e.g. join in with the theme and promoted jointly). Efforts could be tailored to target specific visitor profiles identified through this strategy's research.</p> <p>Some of the group trips to the area include commercial tours and some are linked with a club or society. This offers a route for introducing additional locations and sampling of existing tourism resources to trip organisers.</p>	

## **Monitoring and Evaluation**

A variety of methods will be used to assess whether the aims of this strategy are being achieved, including:

- Delivery of the East Cambridgeshire Tourism Action Plan (Appendix i)
- Monitoring and reporting on the performance of this strategy and action plan annually through the Service Planning Process
- Repeat research with visitors
- Evaluation of website (after 1 year of launch then periodically thereafter)