

A destination management plan for North Yorkshire

Many destinations.

One destination management plan.

A visitor economy recognised for:

Sustainable and responsible growth | Positive impact on economy and quality of life | Engagement, relevance and support



This is an exciting time for North Yorkshire as we develop our Destination Management Plan (DMP).

This DMP will bring together the needs of our many destinations. It is a plan which will lead, influence and coordinate all aspects of our destination which contribute to a visitor's experience. It is a plan that

will take account of the needs of visitors, local residents, businesses, and the environment. It will join all key stakeholders in a shared statement of intent to manage the destination, and it will set out who is responsible for delivery.

We all know well managed places are great to visit, to live and work in; and they are more likely to generate sustainable growth in their visitor economy and maximise the long-term benefits of that growth. This plan will mean that the visitor economy in North Yorkshire is developed to positively impact on the quality of life of residents and for the benefit of the wider local economy.



The vision for North Yorkshire's visitor economy is to create a vibrant, thriving, year-round visitor destination; offering sustainable growth for the visitor economy coupled with significant opportunities to improve the current offer and develop new, meaningful experiences, events, and products.

The aspiration for the future is a healthy and performing visitor economy in North Yorkshire, with increased domestic visitor spend, day visitors converting to visitors staying longer and exploring more, and a destination which can attract more international visitors.

Growth Targets

Our targets for growth for the lifetime of this plan (based on 2019 Visit England Figures) will be:

- 4% growth per annum between now and 2025 - £1.62bn
- 5% growth between 2026 and 2030 - £2bn

To grow the number of overnight visitors to more than 20% of all visits which equates to 6m overnight visits.

This DMP will ensure we retain a focus on sustainability, inclusivity, collaboration, engagement, and respect. All actions will minimise the negative environmental and social impacts of tourism, whilst enhancing the economic and cultural benefits for visitors, businesses, and local people. It will focus on improved connectivity providing the blueprint for new opportunities for businesses, an increase in quality, improved jobs and skills, sustainable and relevant investment and development, and importantly, a range of benefits for local people.

The value of tourism

Prior to the pandemic tourism was valued as a \$1,482bn global industry from tourists travelling internationally.

The UK Tourism Recovery Plan Update in March 2023 showed that the picture of recovery was mixed. Domestic trips were almost back to normal at the end of 2021 with 100 million trips taken between April and December contributing to £22.2m in spend. International visits however remained dramatically behind the levels of 2019; the full year of 2022 showed that international visitor numbers were still 73% behind compared to 2019. A separate report published by Oxford Economics predicts tourism in the UK will only return in full to 2019 levels of volume and expenditure by 2025.

However, the world has moved on significantly and this plan is set in the context of both a cost of living and cost of doing business crisis. Businesses are being hampered in their attempts to make profit by rising energy bills, rising costs of goods and the lack of ability to attract good labour.

The value of tourism to North Yorkshire

Historically there has not been a consistent collection of economic data across the former local authority areas. However, Scarborough and Ryedale utilise Cambridge Model, and Harrogate and the North Yorks Moors National Park use the Scarborough Tourism Economic Activity Model (STEAM). Economic data for Richmond, Craven and Hambleton are taken from the Visit Britain 2019 volume and value figures.

The table below gives the available economic data for constituent areas of North Yorkshire:

Area	Volume (Day and overnight visitors)	Value	Year	Source
Harrogate	6.4m	£606m	2019	STEAM
Scarborough	10.24m	£610.m	2019	CAMBRIDGE
Ryedale	6.82m	£281.10m	2019	CAMBRIDGE
Selby	2.7m	£129.51m	2019	CAMBRIDGE
Richmond	2.5	£239m	2019	Visit Britain
Craven	4.8	£167m	2019	Visit Britain
Hambleton	4.3	£129m	2019	Visit Britain

The total visitor numbers for North Yorkshire account for 37.76m visitors generating £1.9b for the local economy. (This is using the districts' 2019 Cambridge and Steam figures and Visit Britain figures). Visit Britain figures across all destinations in 2019 suggested that there were 33m visitors to North Yorkshire spending £1.5b in the local economy.

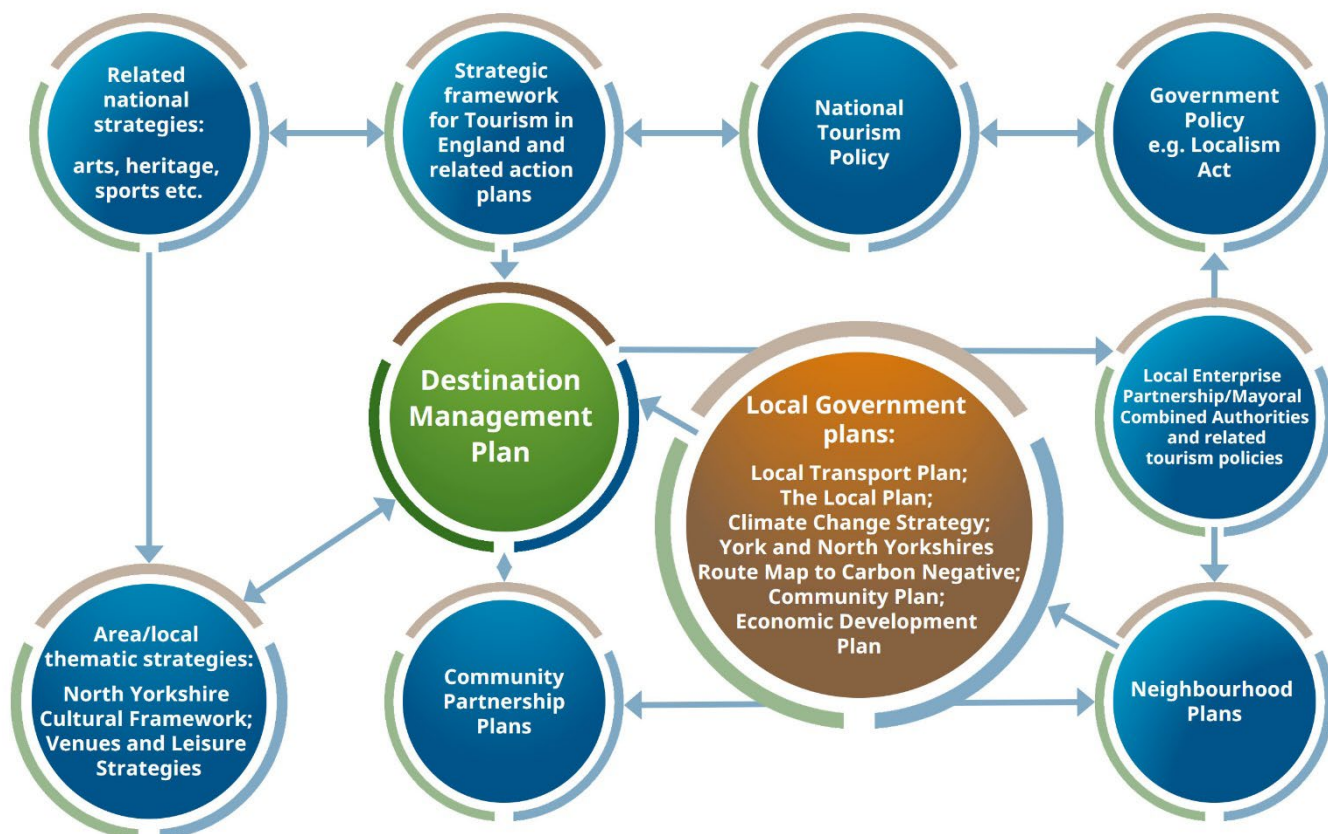
In addition to the district Volume and Value figures the North York Moors National Park (NYMNP) and the Yorkshire Dales use STEAM data to monitor their volume and value across the whole of the park. The 2019 figures identify that the NYMNP attracts 8.38m visitors which generates £730m for the local economy and the Yorkshire Dales attracts 10.44m visitors generating £806m for the local economy.

A new model for monitoring volume and value across the county will be utilised moving forward to ensure that there is a more consistent approach and this will be reported in to Visit Britain.

Strategic and policy alignment

This DMP will identify how the full range of partner and local authority policies and services (in planning, transport, environmental management, leisure and recreation, culture, and the arts) can support the visitor economy. It will align with North Yorkshire Council's Corporate Plan ambitions around Place and Environment, Economy, and Health and Wellbeing, and ensure delivery supports the corporate plan's vision to build on North Yorkshire's natural capital, strong local economy and resilient communities.

Moving from multiple local authorities to the new unitary council means that we are building on the foundations laid in multiple plans and strategies. They are all at different stages and geographies, however they provide a platform for the development of this new DMP.



Strategic and Policy Framework

Priorities

Priority one: data and intelligence

What the consultations and workshops told us: All work should be driven by data, economic impact, and possible environmental impact; and an audit of current and previous data is imperative. There must be more understanding of both the customer and the customer journey, including ease of travel, cost of travel, onward travel, sustainable travel.

There are many key questions which need to be answered to prioritise the direction of travel. This includes a better understanding of visitors, local and the visiting friends and relatives market, market segments and visitor types is important, as is more direct feedback from visitors.

A review of foot fall data, car park data and data from Online Travel Agencies (OTAs) pre-arrival information will help build a clearer picture.

What are the next steps?

We will

- Undertake an audit of all current data
- Develop a shared repository for data (new and historic)
- Undertake a perception and visitor survey identifying barriers to visiting North Yorkshire
- Carry out a residents' survey
- Identify software solutions to support data gathering and dissemination to industry.
- Develop templates for businesses to use to ensure consistency and relevance both to business and economic impact

Priority two: Place

What the consultations and workshops told us: Public transport and connectivity remains the most frequently raised issue; simply more regular and reliable public transport, particularly matching trading times and after 4pm – this includes improved transport links to join up towns, connect major population hubs and enable touring. The issue of poor public transport is coupled with the perceived lack of private car hire.

Sensible, and sustainable development of a quality tourism product is imperative, but the area must retain its uniqueness and beauty and not become homogenised; best practice and lessons learnt are key to shape places but must not try to make every destination the same.

It must be clear to all stakeholders who manages and responds to place related issues, and who takes the place agenda forward. Private sector partnerships are key to the future of places, as well as clarity on routes for businesses and stakeholders to feed into the place making agenda.

Car parking, coach parking, park and ride, car parking costs and general facilities across the whole destination remain an issue and an opportunity to develop for the benefit of residents and visitors alike. Similarly, signage at all levels is important and best practice in terms of signage



across the region, signage and event notice boards/maps should be considered, including areas where more contemporary and artistic ideas can be deployed.

More sustainably, visitors on two feet and two wheels should be better provided for, including bike storage, investment in high quality rights of way network, better signage, and connection of cycle routes. A focused cycle strategy and more cohesion for cycling groups is paramount. It is questioned whether the destination is accessible at all levels and if all needs are understood and catered for.

It is questioned where the destination is accessible at all levels and if all needs are understood and catered for. An audit should be undertaken and an accessible group developed to ensure that the needs of this market are being met.

Licensing and street trading rules vary across the former council districts, and a common/shared practice must be introduced to support existing trading and ensure ease of future trading across the whole county.

The issue of second homes/holiday lets and the need to get the right balance for local people and visitors is important, as is considering more affordable accommodation for young people and hospitality workers (student accommodation models).

What are the next steps?

We will:

- Gather best practice place examples from around the county and expand/replicate as appropriate

Set up a network of visitor economy advisory and support groups:

- Strategic transport working group to include highways/parking/public transport operators and visitor economy partners.
- Establish an overarching North Yorkshire Tourism Advisory Board
- A visitor information group
- A responsible tourism group

Develop a suite of strategies/policies to focus activities and provide direction for action:

- A destination marketing strategy
- A leisure events strategy
- A business events and conference strategy
- A product development strategy
- A responsible tourism strategy
- A signage strategy

- Develop a campervan policy

Audit and engage with plans and develop best practice:

- Input into market town investment plans
- Undertake an audit of infrastructure to improve quality and establish a best practice toolkit – establish a signage strategy
- Undertake an audit of service provisions for different markets i.e. travel trade, business tourism

Priority three: People

What the consultations and workshops told us: The importance of recruiting, training, and retaining people is consistently highlighted as an issue. It is essential to make tourism a career that is valued and not perceived as summer job.

There is much work to do on connecting with the relevant agencies agendas and strategies which are in place to tackle this problem including Local Skills Improvement Partnerships, schools, colleges and skills agencies.

A mapping exercise should be undertaken to understand who the major employers and educators are, and a plan to bring them together to consider this agenda is required. The issue of transport to work and the difficulties of recruitment due to geography and transport challenge, with examples such as wheels to work and car sharing being proposed.

Businesses should come together to share best practice about working with volunteers and develop toolkits and a framework for supporting, educating, and connecting volunteers across North Yorkshire. The engagement in relation to the Destination Management Plan and the opportunities it presents is well received, the pride in the destination is evident and should be preserved and nurtured. This process should enable the development of networking, which is consistent, relevant, and regular; to discuss the points raised through the DMP process and how to tackle it.

The process will provide the platform for collaboration around key themes and projects, and the routes for joint working with the Federation of Small Business and York and North Yorkshire Chamber of Trade, through a mapping of all business groups.



What are the next steps?

We will:

Industry and businesses

- Develop B2B communications
- Develop a partnership plan
- Create links with York and North Yorkshire Chamber Hospitality Forum who have responsibility for the Local Skills Improvement Plan
- Creation of comprehensive industry facing website with access to business resources and toolkits

Quality and best practice

- Drive up quality through development of North Yorkshire tourism awards linked into the Visit England awards
- Identify knowledge and share best practice between sectors

Careers and skills

- Promote tourism as a career – work with education partners to identify those that offer qualifications in the visitor economy and work with them to showcase the diversity of the hospitality sector.
- Develop a campaign to promote tourism as a viable career highlighting diversity
- Link employers to higher education providers

Visitor information, ambassadors and familiarisation

- Develop visitor information strategy to reflect new and emerging technologies to meet the needs of target markets
- Develop an ambassador programme focusing on sense of place and improving product knowledge locally and across the county

Local people

- Create a North Yorkshire residents festival out of season

Priority four: Product development

What the consultations and workshops told us: The area is rich with opportunities for product development which focus on excellence and highlight its local distinctiveness, both developing new products, bringing the hidden gems to the foreground to re-direct the spotlight, and building on/improving existing.



Key themes include – history and heritage, wildlife, geocaches, food and drink and farm diversification, waterways and canal boats, trails and itineraries, night-time economy, coast, great outdoors, pet friendly, muddy boots and dog walks, markets, country estates, sport and activities, wellbeing, slower pace of life, indulge, relax and watch, dark skies. It is particularly relevant to build on the arts, culture, entertainment and events scene across North

Yorkshire and more activity led experiences. In addition, film and TV location trails, James Herriot, and the opportunities this profile presents, should be maximised.

Underpinning product development is a focus on business development. The DMP should create opportunities for businesses to grow and support the quality message (accommodation, food, and drink, welcome) and this should include toolkits for businesses.

What are the next steps?

We will

- Agree the priority experiences and products across North Yorkshire and investment priorities.
For each theme identify key players and form cluster networks; identifying gaps.
Draw up action plan for each theme – including marketing and product development.
- Highlight best practice by businesses (via inclusion in product development toolkits)
- Align with the current High Street Activity

- Ensure sustainability and accessibility used as a filter for all activity – need champions in all groups
- Maximise the opportunity to showcase locally made artisan makers and producers to visitors but also to businesses to support circular economy
- Build on the interim cultural plan and framework to maximise culture in the product development strategy

Priority five: Position and profile

What the consultations and workshops told us: The creation of one organisation and one approach to branding, marketing and positioning will run in parallel to the activities outlined in the DMP. It is important however, to outline thinking gathered during consultation to enable the next stage of marketing development.

The conditions are right to develop more opportunities for cross promotion and this should be developed, both for attracting visitors but also for sharing information and case studies.

There is clearly a need to ensure that work continues to use the strong brands of North Yorkshire to attract visitors and develop themes focusing on the county's unique selling points (USP's) in order to disperse visitors across the county. The key themes for development and focus based on previous strategies developed could include outdoor, health and wellbeing; history and heritage; culture and creativity; food and drink; screen and stage and literary tourism; and sport and events and festivals.

A review of the current target markets must be undertaken in line with new intelligence and product development. The county currently focuses on country loving traditionalists, free and easy mini-breakers and aspirational family fun, and the development of new themes and experiences will provide opportunities to attract new markets and improve the offer to the existing markets.

What are the next steps?

We will

- Develop destination marketing strategy
- Conduct a brand review of all customer facing brands
- Develop brand identity and toolkit
- Develop a marketing and communications strategy
- Develop a shared asset library
- Determine key events and exhibitions to attend
- Work in partnership with other Yorkshire Local Visitor Economy Partnerships on raising the profile of Yorkshire nationally and internationally across both leisure and business markets

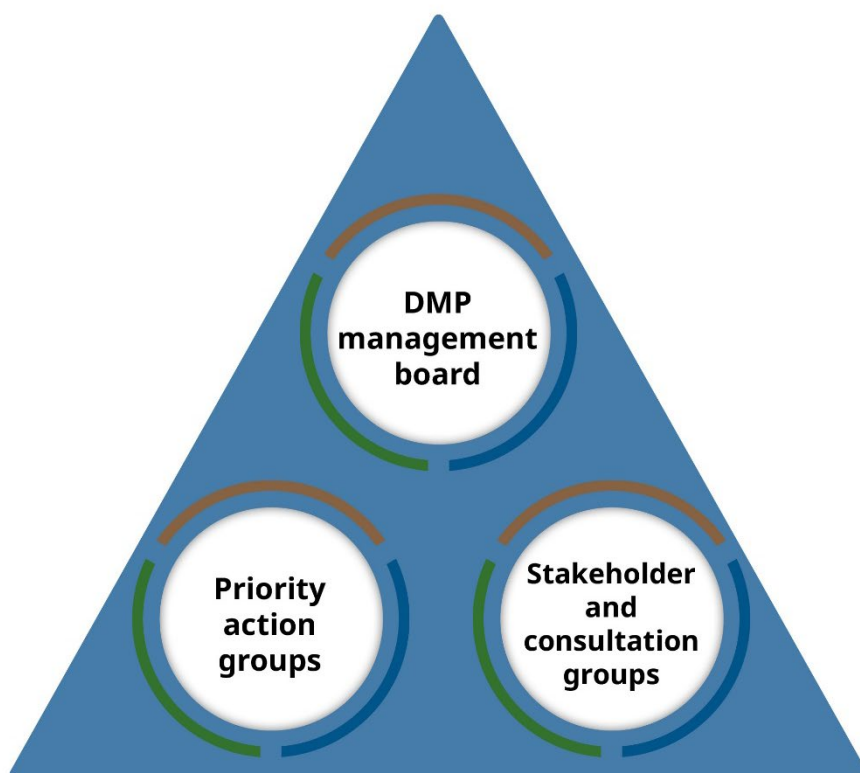
Implementation, action, delivery

This DMP is a plan for North Yorkshire and therefore, its oversight, direction and implementation is a North Yorkshire team approach.

Whilst year one actions have been identified, the ongoing development of annual action plans and implementation will be taken forward by a team of engaged stakeholders working with the North Yorkshire Tourism team. Each priority will have an agreed champion, who will sit on this DMP management board.

There will be a focus on priorities and action and a regular forum to discuss outcomes and next steps.

Management Board



The management board will have agreed representatives from North Yorkshire Council, the tourism team, key stakeholders and advisors and the priority champions.