



# VISITOR ECONOMY AT THE HEART OF YORKSHIRE 2022 - 2025

Visitor Economy Strategy Refresh for Selby District 2022 - 2025



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## INTRODUCTION

This refresh of the existing visitor economy strategy highlights why the visitor economy is important to the Selby District, what can be done to support its growth and what that growth can mean. It documents the area's unique personality and authentic products and experiences, together with the sector's desire and enthusiasm to showcase it collectively.

By progressing foundations built over the previous four years, incorporating evidence, learnings and insights gathered as part of the previous strategy, and by identifying key priorities for the next three years, this refreshed strategy reaffirms the case for Selby District as a great place to live and visit; to attract visitors, and to improve quality of life for our residents.

It articulates the growing ambition for Selby District's visitor economy. It analyses opportunities and challenges that the area, and the sector, faces; it focuses on priorities to improve the visitor experience, develop richer experiences, and attract more visitors and spending in the Selby District, while celebrating its identity, heritage, arts and culture.

Selby District is located right at the centre, or heart, of the historic county of Yorkshire, with bustling market towns, charming villages, stunning medieval architecture and beautiful countryside. The area has witnessed monumental moments of history that have left their mark and influenced the district's unique character. The Visitor Economy Strategy and Cultural Development Framework put these stories and key assets at the heart of regeneration and revitalisation plans, as these sectors grow within the District's economy and enhance image and reputation.

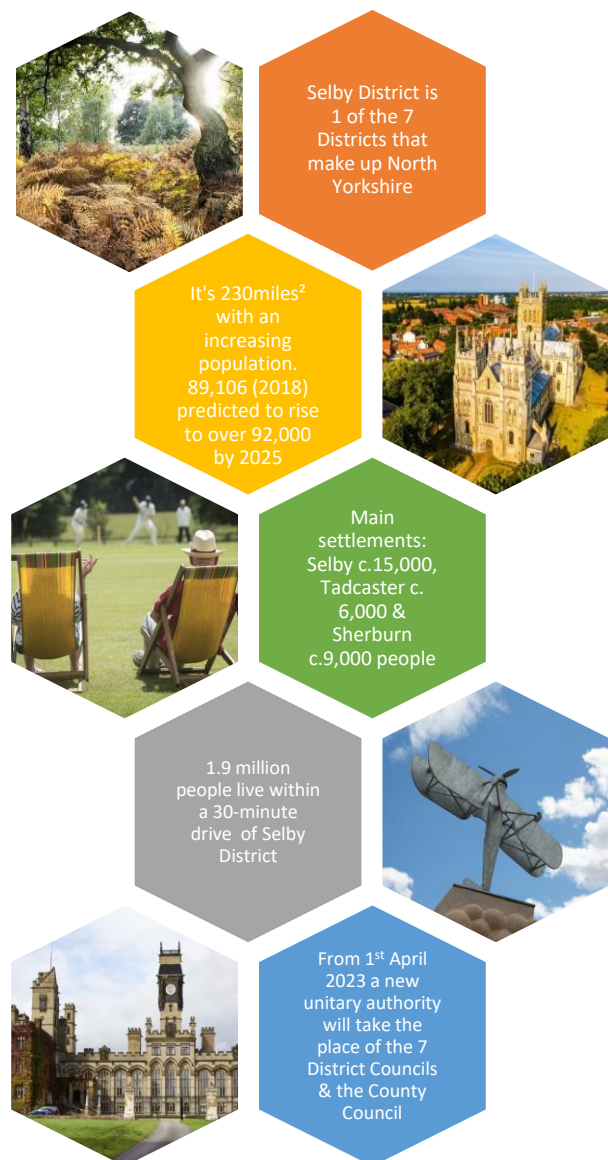


Fig 1. Facts about Selby District

## OVERVIEW OF SELBY DISTRICT'S VISITOR ECONOMY

Visitor economy is a place-centred concept concerned with the whole environment in which visitors, locals and tourists interact. It focuses on the elements that attract visitors and the infrastructure and services that support their visit.

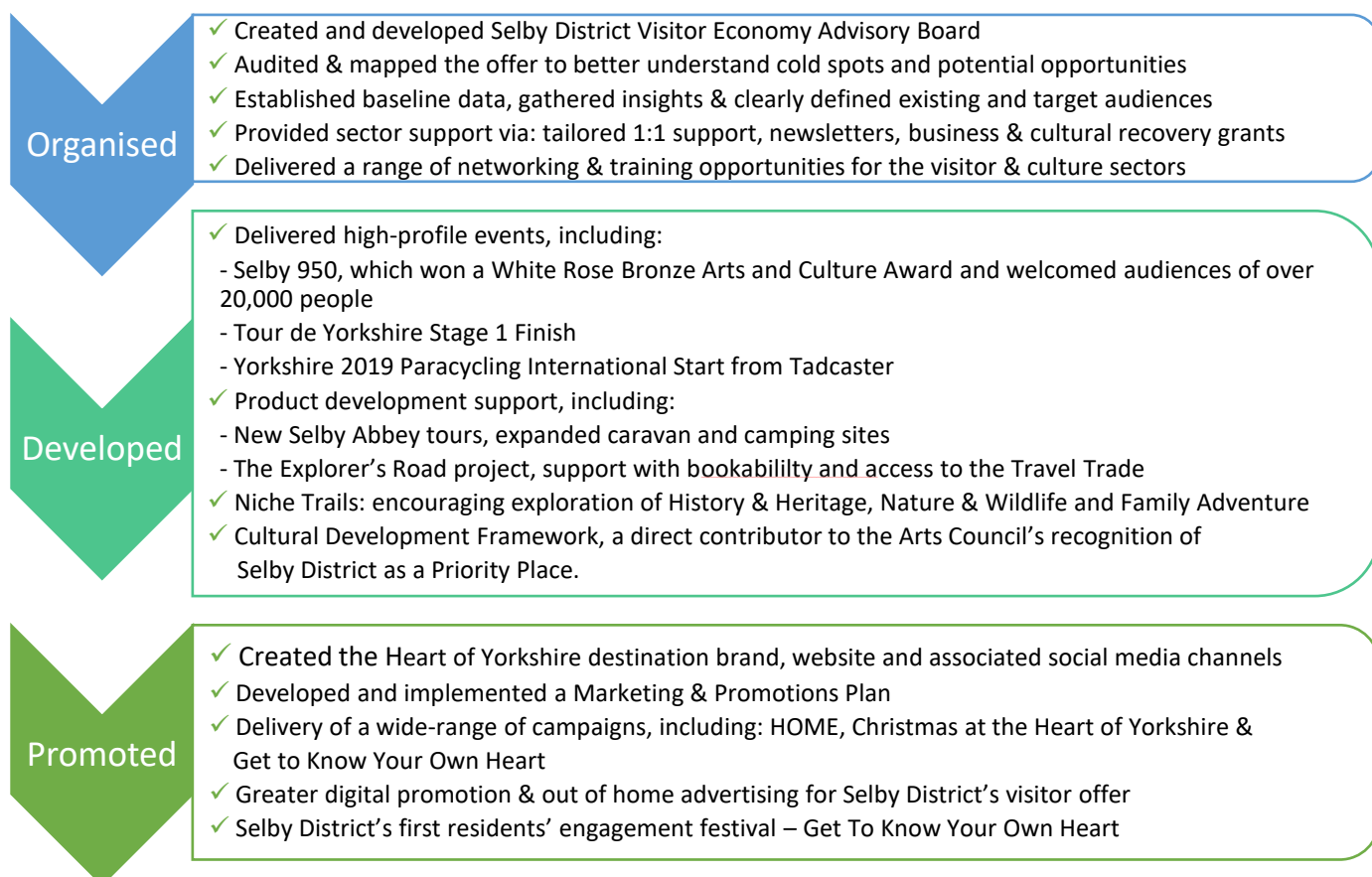
In delivering the Visitor Economy Strategy 2018-2022 'Making Selby District a Great Place...', significant progress was made, despite challenges throughout the period including the Covid-19 pandemic, its associated national and international restrictions, Brexit and resultant changing market demands.

The strategy recognised the role that the town centres and the breadth of visitor assets have in making Selby District a great place to live and work. Specifically, it set out to develop the visitor offer, so that both residents and visitors alike could discover and celebrate the district's rich cultural heritage and unique locations. It was the first of its kind for Selby District; 'A Strategy for Growth' that recognised the visitor economy was an under-exploited, and poorly understood, sector within the district.

It was built around 4 key outcomes:

- Play a crucial role in the District's Economic Development Framework and boost the local economy
- Improve the lives and wellbeing of residents, as well as improving the experience for visitors
- Encourage and create community ambassadors and advocates for the District
- Directly address the ambitions of key visitor economy stakeholders

**Fig. 2 Visitor Economy Strategy 2018-2022: Achievements**

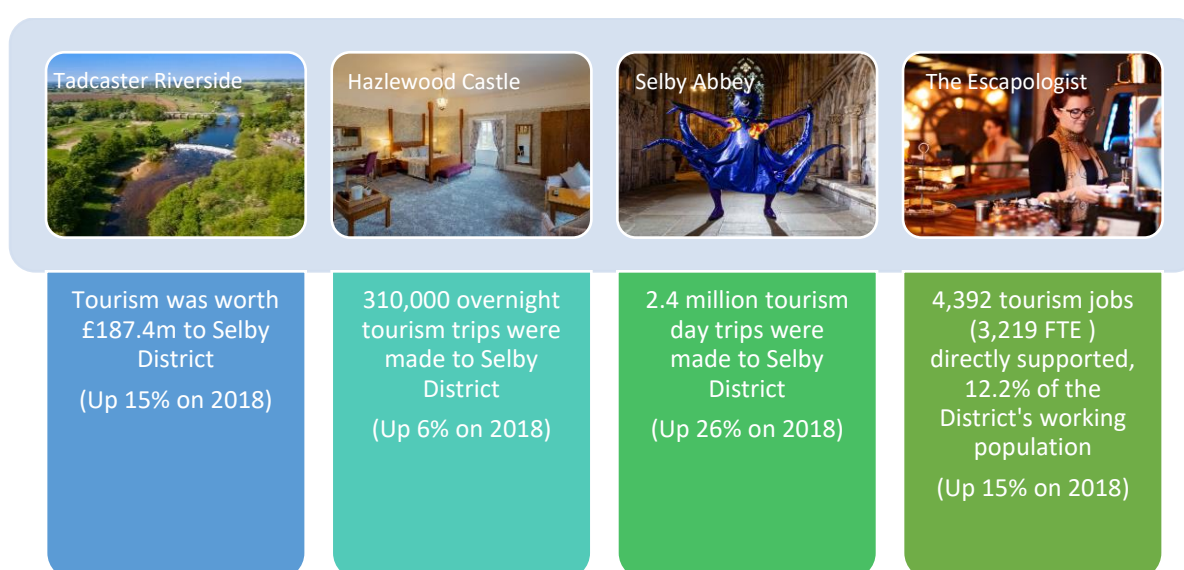


The overriding objective of the strategy was to grow the sector by 20% by the end of 2022, having established a credible baseline in 2018.

The Cambridge Model Economic Impact of Tourism<sup>1</sup> report for 2019 indicated that the development of the strategy was having an impact, with the volume and value of tourism in Selby District increasing by 23% and 15% respectively, when compared to 2018.

The district's visitor economy contributed **£187.4 million in 2019**, supporting **4,392 jobs**, meaning **12.2%** of the working population in Selby District were employed as a result of tourism, and the visitor economy saw a growth in value of 20% between 2017 –2019.

**Fig.3. The Economic Impact of Tourism for Selby District 2019**



## HEART OF YORKSHIRE – OUR BRAND AND RAISING THE PROFILE OF OUR STORY

Over the last three years, Selby District has worked collaboratively with visitor and culture economy businesses to develop and build a clearly defined and authentic identity and destination brand for the area. This has been achieved by examining the unique personality that sets the district apart and using that as the touchstone to build a deeply authentic visitor destination place-brand.

The district offers a warm and genuine welcome, as well as original and exciting product, with a strong heritage and a wealth of fascinating stories to share.

With the Heart of Yorkshire identity, the district can, collectively, tell a very compelling story around its visitor and culture offer and shine a spotlight on the area. It can:

- Encourage residents to learn more about their district and explore from their own doorstep.

<sup>1</sup> Cambridge Tourism Economic Impact Model is a computer-based model developed by Geoff Broom Associates and the Regional Tourist Boards of England. It is an industry standard model and in its basic form, distributes regional activity as measured in national surveys to local areas using 'drivers' such as accommodation stock and occupancy which influence the distribution of tourism at local level.

- Entice visitors from neighbouring towns, cities and villages to discover the area's rich cultural heritage and unique locations.
- Promote the area as a whole, including the principal settlements of Selby, Tadcaster and Sherburn-in-Elmet.
- Put our local audience at the heart of activities, ensuring the identity is relevant and enticing for them first and foremost, building attachment and a sense of ownership.
- Promote the area's strong assets such as: heritage, outdoor activity and wildlife and churches.
- Connect more people to their home, encourage more people to move around within the district and, in doing so, make people more invested in their Place.
- Create a range of marketing material and initiatives to better promote the area's assets.
- Deliver marketing activity that promotes the uniqueness found at the Heart of Yorkshire, its villages, its landscapes, its market towns, its industries and its assets.
- Increase pride in local residents, making them ambassadors for their local area.
- Positively influence perceptions of the Heart of Yorkshire, amongst local and national audiences.

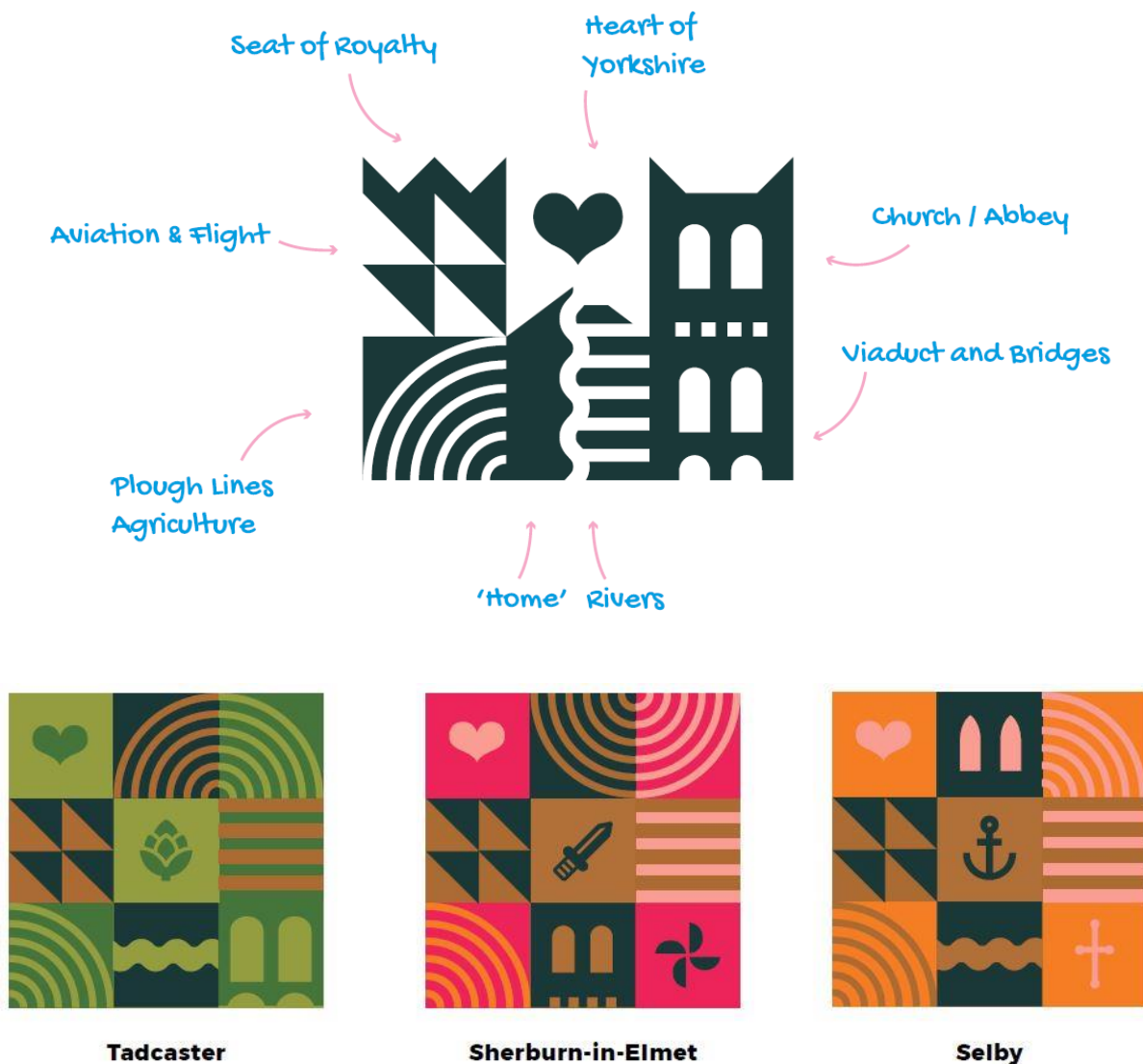


Fig. 4 Heart of Yorkshire Brand Identity

## THE HEART OF THE OFFER

Selby District has a diverse and exciting offer for residents and visitors, including Heritage, Arts and Culture, Food and Drink, and Nature and Green Spaces.

**Fig 5. Overview of some of Selby District Visitor Economy Products and Experiences**

117 accommodation establishments	400+ food & drink establishments	100s of unique attractions
<ul style="list-style-type: none"> <li>•4890 bed-spaces</li> <li>•53 self-catering properties</li> <li>•21 camping &amp; caravanning sites</li> <li>•18 guest houses/B&amp;Bs</li> <li>•15 hotels/motels</li> <li>•8 inns</li> <li>•2 glamping sites</li> </ul>	<ul style="list-style-type: none"> <li>•83 pubs</li> <li>•45 cafes/tea rooms</li> <li>•32 restaurants</li> <li>•7 bakeries</li> <li>•6 breweries</li> <li>•9 butchers</li> <li>•1 gin distillery</li> </ul>	<ul style="list-style-type: none"> <li>•Heritage attractions e.g. Selby Abbey, Towton Battlefield, Carlton Towers, village churches and trails</li> <li>•Nature &amp; wildlife attractions e.g. Stillingfleet Lodge Gardens, Skipwith Common, Barlow Common, Trans-Pennine Trail</li> <li>•Cultural experiences e.g. Selby Town Hall, rural touring at village halls, Riley Smith Hall, Festivals and specialist markets</li> <li>•Art &amp; craft experiences e.g. Dragon Willow, Silver &amp; Stone, Clay Fever</li> <li>•Adventure e.g. Elmet Alpaca Trekking Centre, Hillam Potting Shed, Yorkshire Paintball Centre, footgolf at Scalm Park</li> <li>•Aviation &amp; transport experiences e.g. Tiger Moth Experience, The Motorist, Sherburn Aero Club, Burn Gliding Club</li> </ul>

## AUDIENCES AT THE HEART OF YORKSHIRE

Existing and key potential audiences have been identified and their characteristics understood (links to segmentation data below).

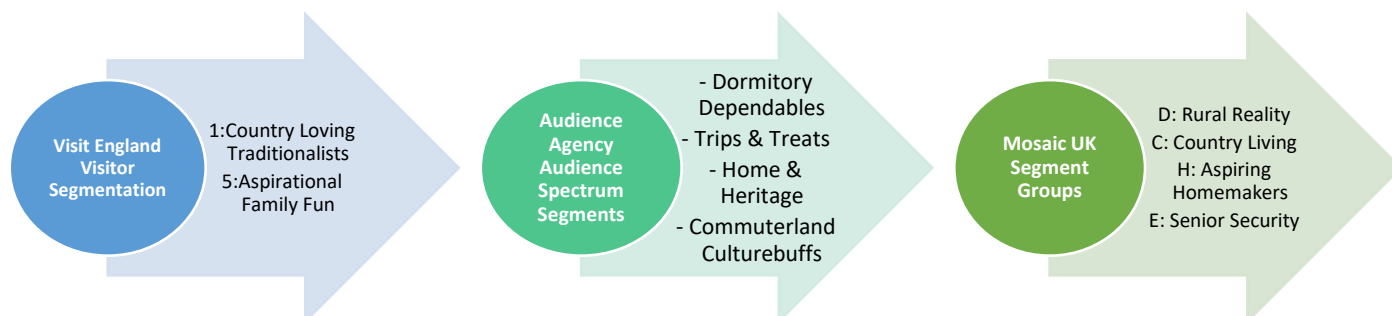
Commonalities include:

- a strong interest in heritage and enjoyment of cultural activity
- a love of the countryside and small towns
- likely to explore the district on days out and to take short UK breaks throughout the year.

Common ways of reaching these groups are via broadsheets, free newspapers, UK tourism websites and mainstream social media.



**Fig.6. Heart of Yorkshire Visitor and Audience Groups**



**Mosaic UK Segment Groups**

**Visit England Visitor Segmentation**

**Audience Agency Audience Spectrum Segments**

CHALLENGES

Recovery from the Pandemic

The most recent Cambridge Model Economic Impact Report for Selby District suggests a decline of 23% in volume and 59% in value, during 2020, a year that hit the visitor economy sector hard. The report recognises that, due to Covid-19 travel restrictions in 2020, the collection of data for the national surveys that are used to inform the Cambridge Model was unavailable and the only valid way to provide figures for 2020 was to apply the published national decline in visitor numbers and spend (where available) to the Cambridge Model data from the previous year. The report was presented with a caveat that data provided in the report should be used as an *indicative overview* of 2020 and caution should be used in directly comparing figures to previous years. Even so, it is clear that Covid-19 had a devastating impact on the tourism and visitor sector throughout 2020 and 2021.

As the situation with Covid continues, it is likely that the sector will experience additional impact (e.g. with new variants emerging, supply chain issues, staff sickness/absence, temporary local lockdown, loss of customer confidence, rising cost of living and other shifts). These impacts are unpredictable and will require continued flexibility and an iterative cycle of listening and responding to the needs of the sector. Other world events, such as the war in Ukraine, will also continue to have significant impact.

At the time of writing, national tourism agency, Visit Britain are advising that it will take some years for visitor numbers to return to 2019 levels. By the end of 2022<sup>2</sup>, they are forecasting visits to have recovered to around 68% of pre-Covid levels, with visit numbers forecast to increase slowly in the spring and more substantially in the summer. The general direction is assumed to be upwards, however, this is contingent on travel restrictions not being tightened significantly from fluctuating levels of Covid, as well as a gradual return of traveller confidence.

<sup>2</sup> Visit Britain 2022 Tourism Forecast: <https://www.visitbritain.org/2022-tourism-forecast>

### Changes in Local Government

Significant changes to the structure of Local Government in North Yorkshire will come into effect from 2023, which means that Selby District Council will no longer exist as a separate authority and will form part of a wider North Yorkshire Council.

Some of the actions outlined in this strategy require very immediate response, whilst others will take some time to develop in order to deliver them in an appropriate way. It is vital that momentum is not lost within the restructure of local government and that the value of existing relationships is recognised and harnessed.

The visitor economy sector in Selby district is smaller than that found in neighbouring, more established, destinations in North Yorkshire, increasing the risk for the tourism sector in Selby district to be overlooked, and to not receive the same investment and/or prominence within the strategies of the new authority.

### Loss of Momentum

Significant progress has been made, over the past three years, in building relationships, networking the sector and developing the offer across the district. A loss in momentum could have a negative effect on those relationships and networks, particularly if delivery is halted whilst reorganisation takes place.

### Regional Competition

The excellent visitor offer provided by neighbouring destinations, such as York, Harrogate, Yorkshire Dales, North York Moors and the Yorkshire Coast, is well known and widely recognised. This presents a challenge for Selby district, in positioning its 'quieter offer', diverse range of 'hidden gems', historical sites and distinctive areas amongst these well-established destinations. The location of Selby District close to the well-known locations of North Yorkshire as well as the large city experiences provided by Leeds, Hull and Sheffield, along with its excellent transport links, offers something different.

## OPPORTUNITIES

### New emphasis on Localhood

As difficult as the past years have been, with attention firmly fixed on enjoying days out more locally and holidaying in the UK, an unprecedented opportunity was presented. Now's the time to encourage the **89,000 residents** living in the Selby District and **1.9 million people living within a 30-minute drive**, to explore at the Heart of Yorkshire and discover everything that the area has to offer. There is an opportunity to grow the interest in everything on offer across Selby district, to significantly raise its profile, change perceptions and develop new audiences. Local communities and residents will benefit from the opportunity to participate in high-quality experiences on their doorstep.

The Green agenda and the cost-of-living crisis are additional factors which may lead people to holiday closer to home, or to forgo holidays completely and, instead plan family days out.

### Local Government Reorganisation

The new authority, and possible Destination Management Organisation (DMO) for North Yorkshire, will create exciting possibilities for working cross boundary, resulting in greater collaboration, development and promotion of key themes, such as food and drink, culture and heritage. With a North Yorkshire DMO covering the geographic area, there is an opportunity to pull the tourism offer together, to present a compelling, highly-recognisable and competitive brand.

The de Bois review of Destination Management Organisations in England, commissioned by the Department for Culture, Media and Sport (DCMS), is concerned with ensuring the right local and regional structures are in place to support the visitor sector's recovery and the UK Government's wider agenda for rebuilding tourism. A North Yorkshire DMO could undertake activities that match development needs of the destination, including those identified in the Selby district, ensuring the destination remains sustainable, competitive and suitably structured to benefit from levelling-up and economic growth agendas.

The Heart of Yorkshire identity can play a role in ensuring that the district of Selby has a place in any new structure that reflects the area's visitor economy, its identity, key strengths, heritage, opportunities, achievements and communities, with significant and distinctive market towns and service villages.

#### Levelling Up and Economic Growth Agendas

Tourism has a significant role to play in delivering the government's wider levelling-up and economic growth agendas. The UK government has made a firm commitment to levelling up the country and the tourism sector has an important part to play in this, given the distribution of tourism jobs and the relative importance of the visitor economy to many parts of the country.

As tourism recovers, the government wants to see the benefits shared across every nation and region, with visitor spending growing year on year, not only within but beyond the usual tourist 'hotspots' to smaller, lesser-known destinations, such as the Heart of Yorkshire. Selby District Council has also been identified as a 'Levelling Up for Culture' area, meaning it will benefit from increased support, staff time and investment from Arts Council England, across a range of funds and opportunities.

#### The Visitor and Culture Economies

Building on the impetus gained through the original Visitor Economy Strategy and the Cultural Development Framework for Selby District (2021 – 2025), the connection of the visitor and cultural sectors can increase resilience and enable the sectors to support one another, to develop new offers and experiences and to share best practise.

Selby District Council has invested significantly in town centre regeneration and in arts and cultural activity, including £600,000 set aside to deliver the Cultural Development Framework, with the intention that this investment will be used to gain leverage from cultural funders such as the Arts Council and National Lottery Heritage Fund. This is part of an ambitious journey to embed arts, heritage and culture at the heart of its place-shaping agenda. Selby District has been identified as an Arts Council England priority place, one of only 15 in the North and the only one in North Yorkshire, meaning development and new opportunities for investment around cultural place-making, all of which create reasons to visit, or to extend dwell time.

#### A RE-FOCUSSED VISION

Building on the solid foundations built over the last years of activity, a re-focused vision has been developed, which acknowledges previous work and identifies the priorities for the coming years:

***Developing passion for the place – at the Heart of Yorkshire***

*For Selby District to stand out as an authentic, enriching and welcoming place to explore, that locals are proud to call home and visitors are excited to visit.*

- The visitor economy will be united, resilient, sustainable and prosperous; responsive to the needs of the residents and communities of the district, celebrating the authenticity and spirit of the area
- The district of Selby will be recognised as a place full of rich stories and quality experiences that contribute to the area socially, economically, and physically
- Local communities and residents will benefit from the opportunity to participate in high-quality experiences on their doorstep
- Selby District’s offer will be more widely understood and valued, regionally, locally and nationally

This Visitor Economy Strategy Refresh sets out Selby District’s ambitions and priorities for the next three years. It is based on learnings and insights garnered from delivery of the previous strategy, collaboration and oversight from the Selby District Visitor Economy Advisory Board. It has also been guided by, and sits within a framework of interdependent policies and plans, including:

- Selby District Council Plan 2020-2030 and delivery priority to: Enable a growing visitor economy underpinned by a sustained focus on enhancing the district’s cultural, retail & leisure offer
- Selby District Cultural Development Framework 2021 - 2025
- Y&NY LEP’s Greener, Fairer, Stronger – A vision for economic recovery
- Heart of Yorkshire Heritage Interpretation Masterplan (2022 - 2025)



## ACTIVITY AT THE HEART

This next phase of development, making our visitor economy even stronger, will be achieved via a range of activity delivered over four key threads, or themes:

- **Connecting**
- **Developing**
- **Promoting**
- **Championing**

In order to achieve the vision, and underpinning the strategy, a clear three-year action plan has been developed. A series of deliverable and measurable actions have been identified for each of the four threads.

The plan will be delivered as a collaboration with the visitor & cultural sectors and will be flexible enough to respond to changing needs. Aspects may be commissioned, delivered by Selby District Council, or by the sector.

Theme	Includes activity which:	Example actions:
<b>1: Connecting</b>	<ul style="list-style-type: none"> <li>• Engages with visitor economy businesses.</li> <li>• Continues to connect and network the sector, as well as linking the cultural and visitor sectors.</li> <li>• Strengthens and maintains relationships.</li> <li>• Establishing and facilitating partnerships, not just locally, but regionally, nationally and internationally.</li> </ul>	<ul style="list-style-type: none"> <li>• Continue to deliver events which encourage visitor economy businesses to share ideas and intelligence, and to collaborate.</li> <li>• Plan and deliver a series of itineraries for Fam(iliarisation) Trips for local businesses, tour operators etc.</li> <li>• Develop and deliver a pilot Selby District Literature Exchange event.</li> <li>• Develop links with relevant international tourist organisations and trade exhibitions e.g. Chinese and USA, to create opportunities and to add value to the strategy.</li> <li>• Implement VE actions from Heritage Interpretation Masterplan</li> </ul>
<b>2: Developing</b>	<ul style="list-style-type: none"> <li>• Supports the testing of new ideas and new thinking.</li> <li>• Plays a key role in developing the visitor experience or visitor journey.</li> <li>• Develops product or offer.</li> <li>• Develops audiences or targets specific, identified visitor segments.</li> </ul>	<ul style="list-style-type: none"> <li>• Implement Food &amp; Drink development plan</li> <li>• Develop the second series of map trails to encourage niche tourism around a number of District assets. Building on first series.</li> <li>• Work with the Institute of Tourist Guiding and Tadcaster's heritage groups to recruit and train a number of volunteers to research, plan, develop and deliver town walks and walking tours, telling the story of Tadcaster's brewing heritage and wider history.</li> </ul>

		<ul style="list-style-type: none"> <li>• Explore opportunities for environmental experiences/products</li> </ul>
<p><b>3: Promoting</b></p>	<ul style="list-style-type: none"> <li>• Continues to raise the profile of the Heart of Yorkshire, its personality and welcome, key assets and its businesses.</li> <li>• Delivers thematic, seasonal, relevant and collaborative marketing campaigns.</li> <li>• Develops greater information provision or increases access.</li> <li>• Uses key identified themes:             <ul style="list-style-type: none"> <li>○ History &amp; Heritage</li> <li>○ Food &amp; Drink</li> <li>○ Arts &amp; Culture</li> <li>○ Nature, Wildlife &amp; Green Spaces.</li> </ul> </li> <li>• Reaches identified audiences:             <ul style="list-style-type: none"> <li>○ Residents</li> <li>○ Visiting friends and relatives</li> <li>○ People living within 30 minutes drive time</li> <li>○ Families</li> <li>○ Older couples.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Deliver marketing campaigns identified in Marketing &amp; Promotion plan (to key themes e.g. Summer activities for families)</li> <li>• Establish new opportunities for placing Heart of Yorkshire content e.g. Visit Leeds</li> <li>• Explore &amp; maximise opportunities to develop cross border activities and itineraries with neighbouring destinations and DMO's e.g Visit Leeds, Visit York etc.</li> <li>• Develop campaigns with SM Influencers, with a particular focus on Instagram (Instagrammable views, experiences etc.)</li> <li>• Continue to build marketing collateral for the Heart of Yorkshire to ensure currency and freshness – images, films, drone footage</li> </ul>
<p><b>4: Championing</b></p>	<ul style="list-style-type: none"> <li>• Harnesses and develops the District's industry experts through business training, support and upskilling.</li> <li>• Gathers and shares industry data, trends and insights.</li> <li>• Ensures there is a unified voice for the sector and that businesses feel they are listened to and their needs and aspirations taken into account.</li> <li>• Sustains development.</li> </ul>	<ul style="list-style-type: none"> <li>• Develop business toolkits for Heart of Yorkshire business area</li> <li>• Review emerging stories/case studies nationally &amp; regionally and collate toolkit of ideas, best practice and data.</li> <li>• Commission or undertake audience research – sentiment, customer journey etc. – and share via Heart of Yorkshire business area</li> </ul>

## APPENDICES

### Discover the Heart of Yorkshire - Brand Identity and Personality

The Heart of Yorkshire brand identity is the visual identity of Selby District’s visitor economy-focused activity.

- It captures the unique essence and personality of the district.
- It is high quality, memorable and immediately recognisable.
- It provides a consistent image, style and tone of voice.

The identity focuses on ‘Heart of Yorkshire’, as a reference to the district’s location and connectivity. It also offers continuity when moving into a new LA structure, ensuring that the geographic area of Selby District, and the businesses within, are not forgotten.

The brand will help the district to stand out, educate and generate awareness, encourage local people to explore locally, and ultimately attract new visitors. It is designed to inspire and promote positive perceptions of the district, and enables the culture and visitor sector to, collectively, deliver a compelling narrative around the district’s visitor offer.



**Tadcaster**



**Sherburn-in-Elmet**



**Selby**

The Heart of Yorkshire brand identity has been developed to raise the profile of Selby District, its key assets, and businesses within, so it is incredibly important it captures the unique essence and personality of the district.

Individual archetypes were explored and personality traits were defined during the creation of the Heart of Yorkshire brand, showcasing what makes Selby District a unique and interesting place.

The personality archetypes thought to best represent Selby District, and used to guide the design of the Heart of Yorkshire branding are:

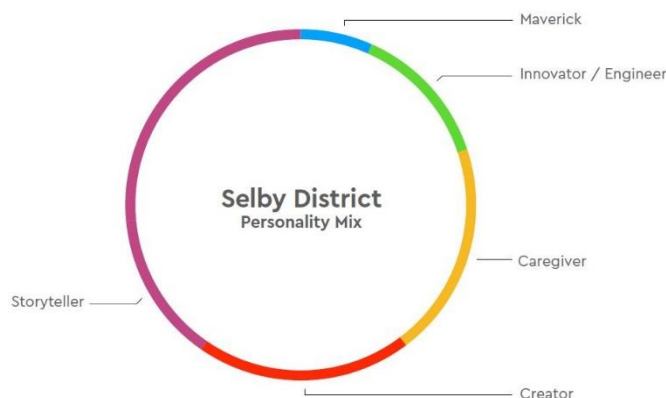
**Caregiver / Companion** - The community of the Selby District project a strong sense of care, a warm, honest decency and genuineness in its people, a care wedded to 'old fashioned' values, looking out for each other, the elderly and the extended family across the district.

**Storyteller** - Stories run like the rivers through the district; the Washington window, the battle of Towton, Humpty Dumpty, Rainbow Warrior II's creation in Selby [Greenpeace's flagship vessel], Tadcaster's bridge collapse during the floods of 2016, the William Morris window and so many more. The stories must be visible to residents and visitors alike.

**Maverick** - Selby District has developed a sense of self-reliance as a defence mechanism following periods of decline due largely to the collapse of industry, it likes to do things its own way, this lends a stoic, quirky-stubbornness to the area.

**Creator / Artist** - The District has lagged behind others when it comes to live performance and access to the arts (with some notable exceptions such as the Selby Town Hall) given the demand and potential the district offers in terms of rural touring and expanded provision in towns, this is a key trait for the district to grow into over the next decade.

**Innovator / Engineer** - Selby District is a powerhouse on the cusp of a metamorphosis, to realise its future potential it must reconnect its rich and once-proud history of making and mining, of powering and feeding with modern innovative practice; bio-tech, knowledge-based industries, vertical farming, screen-based industries, green-energy, modular house-building are all areas the region excels in, we must fire the imaginations of a new generation of young people, reconnecting their skills with local opportunities that can become viable careers.





### The Heart of Yorkshire Toolkit

The Heart of Yorkshire toolkit enables visitor and cultural economy businesses and organisations to make the most of Heart of Yorkshire marketing and promotions activity, and to feature it in their own marketing. The Heart of Yorkshire identity is available for them to use across their promotional material, as they introduce the District and talk about its assets.

The toolkit contains a range of marketing material, including Heart of Yorkshire logos, brand guidelines and personality mix, logo usage guide with advice on how to use the logo, sample copy about the Heart of Yorkshire and a selection of images from across Selby District.

The toolkit is showcased on the Explore Heart of Yorkshire website and is available to download:

[Heart of Yorkshire Toolkit](#)

### Food and Drink Audit and Maps

The Food and Drink Audit, completed in 2022 identified food and drink product across the district, including producers, suppliers and farm shops, as well as restaurants, cafes and tearooms etc.

The 'All Categories' audit map can be seen here: [Selby District Food & Drink Audit – All Categories](#). Audit maps for individual categories can also be found in the audit.

### Available data sets:

Cambridge Economic Impact of Tourism Reports for 2017, 2018, 2019 and 2020.

Selby District Accommodation Audit 2021

Selby District Food & Drink Audit 2022

Audience Agency Area Profile Report + 2019

Audience Agency Drive Time & Distance report Selby 950

Evaluation report for Selby 950

Audience Agency Local Audience Research 2019

Audience Agency Area Profile Report + 2021

Audience Agency Engagement Area Profile and Drive Time Report 2021