

North York Moors National Park Authority

21 September 2015

Tourism – Update and Proposed Future Working

1. Purpose of the Report

- 1.1 To update members on the development of tourism in the North York Moors and the Authority's work to promote and support this.
- 1.2 To propose future work relating to tourism.

2. Background

2.1 Tourism in the North York Moors

- 2.1.1 Tourism is vitally important to the North York Moors area, playing a major role in the economies and fortunes of many of our villages and communities; it is the single largest element of the local economy. Latest figures from the annual STEAM report¹ indicate that the real term value of tourism for the North York Moors and its influence area increased by 4.2% in the twelve months from 2013 to reach £582 million in 2014, with 7.3 million visitors (+5.2%), 11.3 million visitor days (+4.2%) and employing nearly 10,500 FTE (+1.8%).
- 2.1.2 The North York Moors has an almost equal mix of day and overnight stayers when looking at total visitor days, with a stronger reliance on staying visitors compared to the rest of Yorkshire and other National Parks, with the exception of the Lake District and the Broads. In line with national trends, there is a shift to shorter breaks, and self-catering providers now offering long weekend and mid-week options, with two changeover days more evident. The area attracts a very high proportion of repeat visitors too.
- 2.1.3 The North York Moors is one of VisitEngland's Attract Brands². Extensive research undertaken by VisitEngland shows that the North York Moors name is one of England's best known destinations recognised by visitors.
- 2.1.4 Until recent years, tourism in the North York Moors was characterised by multiple brands and a lack of clear identity. There was also a top down approach to planning and a weaker connection between agencies and tourism businesses. This has prevented the development of a clear, coordinated approach to investment and promotion, which is informed by those businesses involved.
- 2.1.5 The tourism sector is central to the delivery of the National Park Authority's second purpose to promote public enjoyment. There is also much that can be done to fulfil the Authority's duty to seek to foster social and economic wellbeing through our work in this area.

¹ Global Tourism Solutions (UK) Ltd (2015) North York Moors National Park Scarborough Tourism Economic Activity Monitor (STEAM) report 2014 for the North York Moors National Park Authority

² www.visitengland.com/sites/default/files/downloads/attract_brands_set2012.pdf

- 2.1.6 Raising the profile of the North York Moors is one of two strategic priorities for the National Park Authority. The development of tourism is a key part of this. Much progress has been made in last three years, by local businesses, by the Authority and by its partners, to address previous weaknesses and deliver improvements.
- 2.1.7 The overlaps between tourism and promotion are clear and many. However, there are some elements of work to raise the profile (for example encouraging volunteering or giving or encouraging visits by disadvantaged people) which do not directly relate to tourism or are not a priority for it. There are also elements of our work on tourism (for example management designed to prevent negative impacts) which do not involve promotion. As set out above, there is a clear link between the Authority's statutory purposes and work to raise the profile of the area and to support the visitor economy (which in turn contributes to delivery of the Authority's duty), but our involvement in both areas must always be couched in delivery of statutory purposes and this will shape the nature of the Authority's work. This report relates to the Authority's work on tourism.
- 2.1.8 The creation of the North York Moors Tourism Network has enabled frequent, more effective communications with its members. The priorities and work programmes pursued by the Authority, including those proposed in this report, reflect the views of the Network's members.

2.2 Strategic Framework and Direction

- 2.2.1 In 2012 the Authority's Management Plan highlighted the importance of tourism both to the area and its communities, and to the Authority in seeking to deliver its second purpose. It identified that in recent years that the sector had been in decline and set out policies and an aspiration for a 3% year-on-year real term growth in the value of the visitor economy. As set out above, this aspiration has been exceeded in the year 2013/14.
- 2.2.2 The Authority's Business Plan (2012 – 15) identified "promotion of the North York Moors to achieve the second purpose and support the local economy" as one of just two strategic priorities. It set out a number of delivery actions aimed at achieving this, including the development and implementation of a Promoting the Park Plan.
- 2.2.3 Comments from businesses, over several years, highlighted issues of imposed structures and a tendency to ignore customers' wishes and behaviour and to base structures and decisions on public authority boundaries. This led the Authority, through discussion with members in both seminars and Committees, in 2012 to an agreed approach to the Authority's work in tourism as follows:
- That we will be led by and build closer relationships with tourism businesses;
 - That the area of focus is the wider North York Moors area – proven to be an effective unit through the recent LEADER programme – including areas and attractions close to but not within the designated National Park, which have significant links to the National Park's visitor economy;
 - That the agreed brand is 'North York Moors'. This is a VisitEngland attract brand, with high levels of recognition both nationally and internationally;
 - That 'National Park' is also an internationally recognised brand and should be used where appropriate;
 - That we should work in close partnership with the Yorkshire Coast brand;
 - That we should establish closer working relationships with key agencies including Welcome to Yorkshire and those agencies promoting the Yorkshire Coast and York, to build a coordinated approach to promotion of tourism in the region;

- That we will seek to secure external resources to support tourism businesses;
- That we should seek to establish the Authority as effective in delivering practical support to tourism businesses, responsive to the expressed needs of those businesses, prior to any move to create more formal destination management partnership structures.

2.2.4 The outcomes from these discussions and further input from businesses, along with an understanding of current trends in the tourism marketplace and best practice from other protected landscapes guided the development of the Promoting the Park Plan. In 2013, the Promoting the Park Plan (April 2013 - March 2016) was agreed, including detailed actions for both tourism and promotion. Much has since been achieved in the delivery of key actions in the Plan.

3. **Key Achievements 2012-15**

3.1 Progress made in the last three years, includes the following:

- The Authority's first Head of Promotion and Tourism, Catriona McLees was recruited;
- The Promoting the Park Plan was agreed and implementation commenced;
- Funding (LEADER) was secured for the 'Moors and More' local distinctiveness project and delivery, working alongside local tourism businesses, was completed successfully;
- One of the key outcomes from the Moors and More project was the creation of the North York Moors Tourism Network. With a membership of some 500 businesses (and growing), the network provides a low cost, non-bureaucratic, effective solution to improving communications, developing joint working between agencies and businesses, and progressing shared plans. It is in essence the foundations of a destination management partnership;
- The Local Distinctiveness and Tourism grant fund was established. To date it has delivered grant support to over 30 tourism businesses, organisations and associations;
- We have more strongly asserted the North York Moors brand and refreshed promotional material;
- New promotional material including films and images have been developed and provided to local businesses;
- The new visitor centred website was launched and has seen growth of over 30% in unique users in the year following its launch;
- Working in partnership with VisitEngland and VisitBritain, successful promotional campaigns have featured the North York Moors;
- Working relations with Welcome to Yorkshire are now more effective and productive, with the Authority having greater input into publications and WTY's website, and the delivery of programmes and events, including the very successful Tour de Yorkshire;
- Working with the Local Enterprise Partnership and tourism businesses we piloted the 'Tourism Revenue Roadmap and Action Plan' process to clarify the needs of the private sector and understand how they can increase revenue from tourism, enabling us to begin to set out priorities for future investment in the sector via the Local Enterprise Partnership's Local Growth Deal Implementation Plan;
- Huge progress has been made in raising the profile of the area, including a much increased presence in national press, television and film;
- Coastal Communities Funding (£455,000) has been secured for the Sea Life, See Life project and delivery is underway.

3.2 The National Park Authority is now better engaged with business, working more closely with agencies and becoming established as an effective tourism delivery organisation with a clearer brand and direction.

3.3 It is now proposed that action be taken to address outstanding issues including:

- the need for a clearly defined partnership with the status necessary to consolidate recognition and represent the brand with bodies such as VisitEngland and the LEP;
- increasing active support for the recognised North York Moors brand from local authorities;
- identification of a small group of industry representatives who are willing to take a more active role in advising the Authority and championing the brand;
- the need to identify the best, industry informed, future course of action to provide support to tourism businesses and the visitor economy.

4. **Proposed Future Action**

4.1 In order to build on the above achievements and continue to deliver a programme which is driven by the needs of local tourism businesses and which meets the strategic objectives of this Authority and its partners, the following actions are proposed.

- Establish the best form for a more clearly identified North York Moors Destination Management Partnership. It is proposed that, given member approval, consultation with businesses be carried out to determine the desired roles, functions and ways of working for a stronger partnership. It is clear that it must be business led, non-bureaucratic, action-focused and have a clearly defined role (see 5).
- Continue to build closer working with VisitBritain, VisitEngland and Welcome to Yorkshire to ensure that opportunities for international, national and regional promotion are maximised (including input into the ongoing Northern Tourism Growth Fund).
- Continue to build closer working relationships between the North York Moors, Visit York and Yorkshire Coast to ensure that complementarity of the key brands in the region is capitalised upon. Encourage local authorities to support these effective, nationally recognised brands.
- Deliver the Sea Life, See Life Project, establish the North York Moors Rural Coastal Community Team and identify priorities for / build the case for further external funding from a future round of the Coastal Communities Fund.
- Review the relevant parts of the existing Promoting the Park Plan (i.e. those elements relating to tourism) and Revenue Roadmap and Action Plan, and combine and update to form a new concise and action focused North York Moors Tourism action plan for 2016 - 21 (guided by and adopted by the Destination Management Partnership).
- Identify and secure external funding to support delivery of Destination Partnership priorities, including via, for example, the Local Enterprise Partnership Local Growth Deal Implementation Plan, LEADER, Coastal Communities Fund and others.
- Continue targeted delivery of business support via the Local Distinctiveness and Tourism grant fund and seek opportunities to increase the funding pot.
- Take appropriate action dependent upon progress of the York Potash development and S106 provisions relating to tourism.

5. **North York Moors Destination Management Partnership**

5.1 As set out above, it is proposed that consultation with business now be carried out to determine the desired form for a more clearly defined destination management partnership to build upon the strong foundations provided by the North York Moors

Tourism Network. Initially, building upon feedback from businesses and learning from past experience, the proposed functions of the partnership are:

- To champion the North York Moors brand as the tourism destination;
- To bring together industry and agencies;
- To identify priorities for action in a new Tourism Action Plan;
- To drive positive action and act as catalysts – especially around inspirational content curation, and product development;
- Provide market intelligence and report on tourism trends;
- Provide support for funding bids;
- Enable exchange of information and best practice;
- NOT to perform accommodation booking services or other traditional generic travel planning roles performed by DMOs, which have now become unnecessary with the growth of user-generated content sites such as TripAdvisor, nor introduce outdated membership models.

5.2 It is intended that the Partnership will be non-bureaucratic, action focused and business led

5.3 Given member approval, businesses will be consulted and appropriate action taken to strengthen the partnership.

6. Financial and Staffing Implications

6.1 This paper is written assuming current levels of Authority resources and an understanding that these may be threatened. Current levels of staffing and expenditure will be sufficient to implement the actions set out in the report. Future delivery of the proposed Tourism Action Plan will be constrained by availability of funds – both the Authority’s and partners, together with any secured from external sources. The plan will however be aspirational in the expectation that the success of the current approach and the size of the industry justifies significant new external investment.

7. Contribution to National Park Management Plan

7.1 The successful implementation of the proposals in this report will contribute to delivery of the following Management Plan policies

Policy	Means to achieve
B1 Visitor spend will be increased.	Ongoing promotional activities by both private and public
	Local Enterprise Partnership priorities
	Promoting the Park Plan (and Tourism Action Plan)
	Partnership agreement with Welcome to Yorkshire
B2 Opportunities for visiting the National Park outside traditional peak season will be promoted	Promoting the Park Plan
	Ongoing promotional activities
	Partnership agreement

B3 Overnight tourism in and around the National Park will be specifically promoted	Promoting the Park Plan
	Ongoing promotional activities
	Partnership agreement
B4 The quality and variety of tourism and recreation facilities and accommodation will be improved	Continuing improvements
	Promoting the Park Plan
	Sustainable Development Fund (Local Distinctiveness and Tourism Grant Fund)
	External funding including via Local Enterprise Partnership
U10 The awareness of the National Park amongst the regional population and visitors will be increased	Promoting the Park Plan
	Partnership agreement
U12 Opportunities to promote the wider North York Moors area and North York Moors National Park brands and sense of place will be created and taken	Promoting the Park Plan
	Partnership agreement

8. Legal Implications

8.1 There are no legal implications arising from this report.

9. Recommendation

- 9.1 That members approve the proposed future action as set out in paragraph 4.1 of the report
- 9.2 That members approve the steps towards strengthening of the Destination Management Partnership for the North York Moors as set out in paragraphs 5.1 – 5.2 of the report

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Background papers to this Report

File ref

1. Promoting the Park Plan 2013-16