

Growing the Visitor Economy of North Yorkshire's Protected Landscapes



YORKSHIRE DALES
National Park Authority



**Howardian
Hills**
Area of Outstanding Natural Beauty

**ENTERPRISE
PARTNERSHIP**
York / North Yorkshire / East Riding

**Business
Inspired
Growth**

Background

Tourism associated with North Yorkshire's four protected areas is an industry worth £1.2bn annually. It is the single largest element of the local economy in the protected areas and is a vitally important element of the sub-regional economy, playing a major role in the fortunes of many of our villages, market towns and communities.

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%). This recent growth follows several years when tourism was in decline.

In the Yorkshire Dales National Park, including the area of influence, a real term increase of 6.6% in the value of tourism was seen in 2013 to reach £565 million, with 9.3 million visitors (+4.6%), 12.4 million visitor days (+3.2%) and employing 9,500 FTE (+3.7%). (Data from 2013-2014 shows a 9.3% increase to £618 million in 2014. However this was the year of the Tour de France which would be regarded as exceptional).²

The North York Moors and Yorkshire Dales are two of VisitEngland's Attract Brands³. Extensive research undertaken by VisitEngland shows that these two destinations are amongst England's best known destinations recognised by visitors.

Recent joint working by the four protected areas, tourism businesses and key agencies has led to more focused work around these two key brands, with the North York Moors brand area, including the Howardian Hills AONB and surrounding market towns and attractions, and the Yorkshire Dales brand area,

including Nidderdale AONB, surrounding market towns and attractions. These are effective areas based on visitor perceptions and activity, and have enabled greater clarity and focused action.



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. Global Tourism Solutions (UK) Ltd (2015) Yorkshire Dales National Park Authority Scarborough Tourism Economic Activity Monitor (STEAM) report 2009-14 for the Yorkshire Dales National Park Authority
3. www.visitengland.com/sites/default/files/downloads/attract_brands_set2012.pdf

Key issues and opportunities

Until recent years, tourism in these areas 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, informed by those businesses involved.

Historically the local authorities within the Dales have worked together to jointly promote the Yorkshire Dales, rather than individual council areas. However with changes to tourism structures and partnerships in recent years, this joint promotion would benefit from reinvigoration.

A further issue in previous years has been a lack of targeted investment and coordinated effort to support businesses and key agencies to innovate, develop new products and drive up quality.

In recent years both National Park Authorities working with the AONBs and businesses engaged in the Visitor Economy have invested to facilitate research, commission workshops and develop tools for businesses, this has also resulted in the creation of two Tourism Networks covering all four protected landscapes and which now represent over 1000 business members. This presents a clear opportunity. It is the foundation for a new style of Destination Management Partnership which is flexible, non-membership based, non-bureaucratic and responsive to business needs.

The networks are enabling frequent, more effective communications with members and some early work on developing work programmes, sharing best practice and developing new ventures. In the Dales, the Destination Dales advisory board is facilitated by the National Park Authority and uses joint YDNPA and NAONB branding

in its communications. It comprises of local tourism interests, both public and private sector, and the Dales Tourism Network coordinator has a place on this board to assist in communication.

The priorities and work programmes pursued in the AONBs and National Parks, including those outlined in this growth programme, now better reflect the views of the Network's members and it is proposed that some modest investment be targeted to consolidate and build on this.

A further emerging key opportunity in the area is the massive development and growth in cycling and cycle tourism. The impact of success at the Olympics, the Tour de France and Tour de Yorkshire combined with previous infrastructure developments, especially at Dalby Forest and Sutton Bank, together with other infrastructure investments such as the Swale Trail, Howardian Hills cycle routes and support to other elements of the cycling tourism experience and major events, has positioned North Yorkshire to become one of the country's finest, most popular locations for cycling and cycle tourism. It is proposed that this is a second area for major focused investment in product development and promotion.

Other investment opportunities which are proposed to build upon the special characteristics of the protected areas and add value to the visitor economy include building upon the opportunities for, and promotion of, "dark skies" and wildlife/nature experiences across the four areas, allowing businesses to tap into the growing demand for experiential tourism.



Next Steps

Closer, more cooperative, collaborative and joined up working across the four protected areas will enable sharing and development of best practice, which will feed into targeted local delivery. In order to build on the above opportunities, tackle the key issues and deliver a programme which is driven by the needs of local tourism businesses, the following actions are proposed:

- Consolidate the existing Tourism Networks to form destination management partnerships fit for purpose for today's tourism environment, enabling more effective communication between businesses and key agencies, driving more targeted and coordinated action and investment and the development of Destination Action Plans.
- More effective and coordinated promotion based around the strongest attract brands, the North York Moors and Yorkshire Dales, but covering a wider area including Howardian Hills and Nidderdale, together with nearby attractions and market towns which form part of the visitors' experience.
- Support for businesses in innovation and development of new packages and products.
- A programme of work to increase the number of young people gaining the skills that will support the rural economy enabling them to live locally and sustain local communities.
- Making North Yorkshire the best place in the UK to cycle. We want North Yorkshire to be on every cyclist's list of places they must go, and to ensure this we have brought together a number of different schemes to give a complete

programme of investment supported by AONBs, National Park Authorities, local authorities, Forestry Commission and Sustrans, and one that reflects the advice of key cycle tourism businesses. Our vision includes the development of new routes and activity hubs, thriving high quality businesses, great promotion and inspiring events.

These proposals are set out in more detail in the Protected Landscapes Rural Growth Plan; together they form a coordinated and cooperative approach to developing the tourism economy across North Yorkshires four protected areas.

