

5 Tourism

The aim of this priority area is to *“develop, manage and promote rural Yorkshire and the Humber as a high quality ‘sustainable tourism’ destination”*.

5.1 Context

Tourism is one of the largest economic sectors in the UK, contributing £74.2bn to the national economy in 2003 and supporting 2.1m jobs. The sector in Yorkshire and Humber was worth £4.2bn in 2003, with a target set of increasing income from tourism to £5.9bn by 2010. It is a major sector within the rural economy of York and North Yorkshire.

Defining the tourism sector¹⁸ is often problematic, with tourism also being closely linked to cultural activities, for example between 3.5m and 3.9m people are estimated to attend festivals in York and North Yorkshire, generating an economic impact of some £250m. Visitor spending also supports a wide range of other local sectors, e.g. shops and local food and drink produce and farms have diversified into accommodation.

The sub regions rural areas are home to many of the regions major attractions, including the Yorkshire Dales, the North York Moors and the coast. It has however also been stated that the sector in the sub region has also been affected by the growth of budget airlines and cheap package holidays. The 2006 Strategic Economic Assessment also reports that the long term growth of employment in this sub-sector is not wholly attributable to visitors but wider drivers and trends, such as increased disposable income, revitalisation of city and town centres, increased employment rates and a changing demography.

5.2 Employment

Tourism accounts for more than 40,000 jobs in the sub region, with more than 4,700 businesses, the majority of which are micro-businesses. Between 2000 and 2004 employment in tourism increased by 9% and now represents more than 22% of regional employment in the sector. In York and North Yorkshire, employment in bars and restaurants is significant, accounting for nearly half of employment. Employment in the largest (bars) and third largest sub-sectors (hotels) has fallen slightly over the past four years, whilst there has been an increase in the number working in the restaurant sector and in sporting related and other recreational activities.

¹⁸ The tourism sector definition used here (provided by Yorkshire Forward for the SEA) includes hospitality – e.g. bars and restaurants, accommodation – e.g. hotels, camp sites and letting of property and entertainment – including sport, recreation and cultural activities

Table 5-1 Business and Employment Dynamism: Tourism Business in York and North Yorkshire

Sub Sectors	Businesses			Employment		
	2000	2004	% change	2000	2004	% change
Bars	1,146	1,161	1	10,144	9,991	-2
Restaurants	924	1,067	15	8,914	9,802	10
Hotels	461	427	-7	8,754	8,341	-5
Sporting activities	499	538	8	3,072	4,510	47
Museums, libraries and cultural activities	133	135	2	1,792	2,226	24
Other recreational activities	178	195	10	1,031	1,973	91
Camp sites and other short-stay accommodation	206	247	20	1,982	1,726	25
Other entertainment activities	296	301	2	1,039	1,565	51
Letting of own property	435	653	50	2,093	1,468	-30
Total	4,278	4,724	10	38,220	41,601	9

Source: 2006 SEA (NOMIS Annual Business Inquiry 2004)

The SEA 2006 also reports that York has the largest numbers employed in tourism, with there also being significant employment in both Harrogate and Scarborough. In terms of absolute numbers, whilst there are fewer tourism jobs in the rural areas, as a proportion of total employment this is often high. This proportion reaches 17% in Richmondshire (which is higher than that seen for York and Harrogate and only one percentage point less than Scarborough). Selby has the lowest "tourism base". The table also highlights how employment in all districts has grown since 2000.

Table 5-2 Distribution of Business and Employment: Tourism

	Workplaces			Employment		
	2000	2004	% change	2000	2004	% change
York	845	934	11	9,950	11,000	10
Harrogate	801	933	16	7,400	8,450	14
Scarborough	766	846	10	7,050	7,450	5
Hambleton	451	531	18	3,350	3,700	10
Ryedale	410	440	7	3,150	3,200	2
Craven	348	368	6	2,800	3,150	13
Richmondshire	331	334	1	2,272	2,400	6
Selby	326	338	4	2,200	2,200	1
Y&NY	4,278	4,724	10	38,200	41,600	9
Y&H	17,933	19,595	9	166,307	188,539	13

Source: 2006 SEA (NOMIS, Annual Business Inquiry 2004)

5.3 Visitor profile and expenditure

There is a great deal of information available, such as the number of trips, visitor expenditure and where visitors are from. It is often the case that data is only available for 2004, although where possible more recent information is commented on. The tourism sector can also be volatile and subject to external shocks, for example in 2001 the number of visitors to the sub region was seriously affected by the Foot and Mouth Disease outbreak and the impact of the September 11th terrorist attacks. However, the impact of this has been partially offset nationally by increased average visitor spend, as domestic tourism goes 'upmarket', and the recovery in international visitors in 2004.

The first part of the analysis focuses on **UK / domestic visitors** (i.e. excludes overseas visitors). During 2004 there were around 10 million domestic (tourist) trips in the region (a decrease of 3 million from 2003), with 4.1 million in the sub region, albeit this being lower than seen in other recent years. Domestic visitors account for 93% of overnight tourists in the sub region. The 7% coming from overseas visitors are generally, but not exclusively visiting the York area.

2004 tourism spend by domestic visitors to the region was approximately £1.5 billion per annum. Spend in York and North Yorkshire was £704 million, a decrease of 15% since 2003. In 2004 the sub region still accounted for 44% of all such expenditure in the region. It is also the case that over 1.5m people (or nearly one third of domestic visitors to the sub region) originated from within the rest of the region. A further 19% come from the rest of the north of England, with 17% coming from London and the South East.

The evidence therefore shows that the sub regions rural areas are dominated by domestic visitors who are primarily from within the region.

Table 5-3 UK / domestic visitor tourism to the Region 2003 (in millions)

	Area	2004	2003	2002	2001	2000	1999	1998
Trips (mn)	Yorkshire & Humber	10	13.1	12.2	11	13.1	10.4	9.2
	North Yorkshire Sub-Region	4.1	4.9	5	4.6	5.7	4.6	4.1
Nights (mn)	Yorkshire & Humber	26.9	35.8	36.3	30.8	42.2	31.6	29.9
	North Yorkshire Sub-Region	12.6	15.7	16	14.4	17.7	16	16
Spend (mn)	Yorkshire & Humber	1584	1930	1,595	1,452	1,691	1,119	940
	North Yorkshire Sub-Region	704	834	766	725	842	657	531

Source: Yorkshire Tourist Board

York and North Yorkshire is dominated by domestic visitors, accounting for the largest proportion of domestic overnight stays in the region. It does however have a lower share of "overseas" tourist nights (29%), with West Yorkshire seeing the highest proportion and accounting for over 600,000 more overnight stays than York and North Yorkshire does.

In terms of **overseas visitors**:

- Although the latest data (2005) is still provisional, more than 400,000 overseas visitors stayed in the sub region - a fall of nearly 5% compared to 2000, but at the same time is a "recovery from more recent years". This is in contrast to the region as a whole, where numbers rose by nearly a quarter. Despite the fall in the number of overseas visitors to the sub region, the number of overnight stays increased from 1.9m in 2000 to 2.2m in 2005 (a 16% increase)
- Expenditure by overseas visitors in York and North Yorkshire peaked in 2004, but in 2005 was still over £100m per annum. This has increased since 2000 (17%), but is below the substantial increase seen for the region (49%)

- Overseas visitors come from a range of countries. The largest number (nearly 50,000 in 2003) were from the USA, with 7% from Australia and 4% from Canada
- Finally in terms of room occupancy rates, in 2005 this was 63% in York, with rates in the rest of the sub region being lower, albeit seeing a rise from 47% to 56% over the last ten years.

5.4 Findings by district and specific visitor attractions

The findings are now considered at a more detailed level, e.g. within particular areas, districts and also visitor numbers to specific attractions in the area. It begins with a brief description of some key areas of tourism.

The moors and coast area

Tourism is vital to the economic prosperity of the sub region's two National Parks. Data from the North York Moors National Park Authority demonstrates that tourism is the largest sector directly employing over 4,700 people and generating nearly £300m for the economy in 2005. Visitor days spent in the Park have risen to 9.3m visitor days (an increase of 43% since 1992), although they fell dramatically in 2001 and have yet to recover. Of these, just over two-thirds were day visitors (6m) and one third stayed overnight (3m). In 2005 spending in the local economy generated by tourism rose sharply to nearly £300m, with there also being "knock-on" benefits, e.g. expenditure in relation to local shops and food and drink.

Visitors to the Park come from a range of locations. The majority of day visitors live within an "easy" travelling distance, with approximately two-thirds coming from Cleveland or the rest of North Yorkshire. Overseas visitors accounted for 6% of overnight stays. Surveys of visitors have shown that the area is valued for its landscape quality, and the peace and tranquillity that it offers. There are however concerns over the impact of increased traffic, higher numbers of visitors, litter and pollution.

Yorkshire Dales and Harrogate

For the Yorkshire Dales and Harrogate, tourism is predicted to be the fastest growing industry over the next five years. In 2005 tourist visitors (direct and indirect) spend in the area was over £750m, directly supporting the employment of nearly 14,000 jobs.

Research of visitors to the Yorkshire Dales and Harrogate highlighted many positives, e.g. that the Yorkshire Dales is seen as more unspoilt than other areas of the country; the history and heritage of the area acts to attract repeat visitors and the variety of tourism opportunities on offer is a key strength.

York

Although not considered fully in this report, the role and importance of York as a key tourist destination and gateway to the sub region shouldn't be ignored when considering the impact of tourism across rural areas.

Visitor attractions by district

When considering visitor numbers, such figures are estimations and are subject to errors as the figures are unknown for some attractions. At a district level there is also a need to consider that a small number of specific attractions can heavily influence such figures (with such attractions featuring later in the chapter). However it does provide a flavour of the sector within the sub region's rural districts.

When considering visitor attraction figures for each district, between 2000 and 2003 significant growth was seen in the rural 80 districts of Richmondshire and Ryedale, with Ryedale also seeing the highest overall volumes (this high figure reflecting the large volume of visitors to Flamingo Land theme park). It should be noted that whilst 2004 data has been included in the table below (where the figures are significantly below those seen for previous years), following this some key methodological changes in the way the data is collected have been implemented and for this reason any trends including this latest year of data haven't been commented here.

Table 5-4 Total Number of Visits to Attractions by district

Area	Visits	Visits	Visits	Visits	% Change	Visits
	2000	2001	2002	2003	2000-2003	2004
Craven	281,439	264,330	273,807	281,854	0%	116,200
Hambleton	290,409	176,764	286,260	285,944	-2%	160,919
Harrogate	509,225	467,110	578,126	650,695	28%	479,263
Richmondshire	463,723	428,411	593,461	635,555	37%	184,281
Ryedale	2,112,651	2,057,513	2,248,435	2,317,060	10%	403,914
Scarborough	536,726	501,097	540,779	534,358	0%	297,132
Selby	35,000	30,500	32,750	36,000	3%	4,641
York	1,250,074	1,532,781	1,679,598	1,611,299	29%	2,345,258
York and North Yorkshire	5,479,247	5,458,506	6,233,216	6,352,765	16%	3,991,608

Source: Yorkshire Tourist Board, 2004.

Specific visitor attractions

The top visitor attractions are shown in the table below.

Table 5-5 Top 4 Free Visitor Attractions in York and North Yorkshire

Attraction	2004	2005	% Change
National Railway Museum (York)	855,032	769,445	-10%
Priory Church of St Mary & St Cuthbert (York)	122,020	126,570	4%
Sutton Bank Visitor Centre	108,586	114,480	5%
Whitby Lifeboat Museum	100,000	100,000 (E)	0%

E = 2005 Estimate

Source: Yorkshire Tourist Board Visitor Attractions Survey, 2005

With an estimated number of visitors for 2005 of just over of 1.4m, Flamingo Land Theme Park and Zoo was the fourth most visited paid attraction in England. Between 2004 and 2005 visitor numbers at three of the sub region's most popular paid attractions have all increased. Yorkshire Tourist Board data for 2005 also shows that RHS Garden Harlow Carr had 179,228 visitors (a 20% increase), Eden Camp had 150,000 visitors, Whitby Abbey had 120,136 visitors (a 4% increase) and 92,672 visitors (a 4% increase) went to Beningbrough Hall & gardens.

Table 5-6 Top 5 Paid Visitor Attractions in York and North Yorkshire

Attraction	District	2004	2005	% Change
Flamingo Land Theme Park & Zoo	Ryedale	1,380,110	1,400,210 (E)	1%
York Minster	York	Not available	803,000	n/a
Dalby Forest Drive & Visitor Centre	Ryedale	360,000	360,000	0%
Fountains Abbey and Studley Royal	Harrogate	300,000	312,000	4%
North Yorkshire Moors Railway	Ryedale	303,000	305,000	1%

E = 2005 Estimate

Source: Yorkshire Tourist Board Visitor Attractions Survey, 2005

Jorvik Viking Centre not included in 2004/05 figures – visitor numbers of 435,000 in 2003 made it the second most visited paid attraction in the sub region.

5.5 Area tourism partnerships

Under the restructuring of the tourism structures three Area Tourism Partnerships were established in the sub region. They have just completed the drafting of their business plans. Some of the key issues identified within the Yorkshire Dales and Moors and coast are summarised below.

Yorkshire Dales and Harrogate

The Area Tourism Partnership has identified six key issues to address to ensure the Yorkshire Dales and Harrogate remains a successful tourism destination. These include:

- Engaging businesses who are at the front-line of delivery to customers;
- Preparing a marketing campaign to target particular audiences;
- Sustainably developing the product by encouraging more spend rather than higher visitor numbers and encouraging the use of public transport;
- Providing the right information for visitors;
- Good quality visitor management;
- Good quality research and information.

More information is available from www.yorkshiredales.org

Moors and Coastal area

A draft Area Tourism Plan has been prepared by the Moors and Coast Area Tourism Partnership. Six priority actions have been identified:

- Marketing the Moors and the Coast;
- Developing a Destination Management System;
- Supporting the development of festivals and events;
- Developing and marketing the Outdoor Events product;
- Develop and market a York and North Yorkshire Cycle Tourism strategy;
- Seek new tourism products.

5.6

Strategic framework for the Visitor Economy and policy implications

The Strategic Framework for the Visitor Economy has been produced by Yorkshire Forward. The framework suggests that activity should be driven by an overarching objective, with Yorkshire and Humber striving to be the “leading edge” region in tourism with higher quality, greater innovation and faster growth than the national average. Seven regional priorities have been identified with subsequent objectives and Actions¹⁹ determining the activity that will contribute towards achieving the ambitious targets that have been set for Yorkshire and Humber. These can be summarised as follows:

Priority	Objective
Sustainable tourism	To achieve growth in the visitor economy which is consistent with the principles of sustainable development.
Innovation & Product development	To be proactive in fostering innovation in tourism and support ‘step change’ development of the tourism product.
Quality & Quality of Place	To achieve increases in visitor satisfaction by improving the quality of place and quality of product.
Business Development & Skills	To support business growth and innovation in tourism through the Better Deal for Business Framework. Develop the entrepreneurial and business skills of the tourism workforce and improve general tourism skill levels.
The Information Base & Market Intelligence	To improve the quality of data available to support long term planning and assist business to be more competitive.
Visitor Information	To gain a strong competitive edge for Yorkshire & Humber by providing state of the art information services.
Marketing	Increase earnings from tourism by targeting high spending visitors. Develop the marketing strategy to deliver the principles of sustainable tourism.

This sets out the framework for the Area Tourism Partnerships and gives a clear set of priorities for the growth and development of the sector within the sub region.

¹⁹ And also suggested targets, although these are not shown below

5.7 Conclusions and policy implications

- Tourism is one of the largest economic sectors within the rural areas of North Yorkshire, accounting for 40,000 jobs in the sub region. This sector can be vulnerable to changing situations in a highly competitive marketplace, in particular by the growth of budget airlines, cheap package holidays marketed by the travel companies, the growth of cities and non traditional tourist areas as destinations and a change in the aspirations of the customer
- The current visitor profile of North Yorkshire is dominated by domestic visitors, many of which are from within the region
- The overseas visitor market for the rural areas is very low and any growth has been slower than the rest of the region. In addition room occupancy levels are lower across North Yorkshire compared to York
- The sub regions rural areas are home to some of the regions most visited attractions, e.g. Flamingo Land, Dalby Forest, etc. This is supplemented with an extremely high quality landscape offer together with attractive market towns
- The sector is of increasing importance to the economy of Richmondshire, Ryedale, Scarborough and parts of Craven, Hambleton and Harrogate
- The Strategic Framework for the Visitor Economy recognises that whilst the tourism industry in the sub region is more mature than in other parts of the region, growth has been slower in recent years and requires improvement in the quality of the tourism product. The focus is on spend rather than numbers per se and also visitor management issues, particularly in remote rural areas where visitors place pressure on local infrastructure and facilities. The sector may also benefit from extending the visitor season into the 'shoulder months' at the beginning and end of the season and increasing the visitor numbers all year round
- The strategic framework for the Visitor Economy should form the framework for future growth in the sector. In particular:
 - Achieving growth in the visitor economy through sustainable tourism
 - Fostering innovation and product development
 - Supporting business growth, development and skills
 - Improving our understanding and market intelligence of the sector to assist in the sector becoming more competitive
 - Targeting high spending visitors.