



Notice of meeting of

Economic Development Partnership Board

To: Councillors Steve Galloway (Chair), Kirk (Vice-Chair), Holvey, Jamieson-Ball, Morley, Merrett, Blanchard and D'Agorne

Jez Willard (Retail Sector), Mr Andrew Scott (First Stop York Tourism Partnership), Mr Brian Anderson (Trades Unions), Mr Len Cruddas (Chamber of Commerce), Mr Mike Galloway (Education/Lifelong Learning Partnership), Mr Kevin Moss (Finance Sector), Prof Tony Robards (University of York), Mr Mark Sessions (Manufacturing Sector) and Julie Hutton (Yorkshire Forward)

Date: Tuesday, 13 March 2007

Time: 6.00 pm

Venue: Guildhall

AGENDA

1. Introductions & Apologies

2. Declarations of Interest

At this point, Members are asked to declare any personal or prejudicial interests they may have in the business on this agenda.

3. Minutes

(Pages 1 - 6)

To approve and sign the minutes of the meeting held on 26 September 2006.

4. Public Participation

At this point in the meeting members of the public who have registered their wish to speak regarding an item on the agenda or an issue within the Board's remit can do so. Anyone who wishes to register or requires further information is requested to contact the Democracy Officer on the contact details listed at the foot of this agenda. The deadline for registering is Monday, 12 March at 5.00pm.

5. York Tourism Strategy and Action Plan (Pages 7 - 48)

This report outlines the proposed new Tourism Strategy for the City of York, which has been developed by the York Tourism Partnership. The report highlights objectives and priorities for tourism in York over the next few years, based on the fundamental principle of increasing visitor spending and length of stay.

6. Northern Way Growth Fund 'Hub and Spoke' Project (Pages 49 - 52)

The objective of this report is to bring members up to date with a major Science City York (SCY) infrastructure project funded through a Northern Way initiative designed to improve the level of innovation across the three Northern Regional Development Agencies regions.

7. Science City York: Establishment of Company Limited by Guarantee Plan (Pages 53 - 56)

The report outlines the current progress in establishing the Science City York Company Limited by Guarantee.

8. Sub-Regional Investment Plan (Pages 57 - 80)

The report outlines the current position in producing a revised Sub-Regional Investment Plan (SRIP), allowing the Board (representing the Local Strategic Partnership) to comment on key issues emerging from the strategic framework for the Sub-Regional Investment Plan. (A colour version of Annex B can be viewed on the council's website www.york.gov.uk under Council Meetings.)

- 9. Progress On Key Issues** (Pages 81 - 104)
This report picks up on any matters arising from the last meeting of the Board and briefs Board members on issues/progress in other areas of economic development activity.

- 10. Any other business which the Chair decides is urgent under the Local Government Act 1972.**

Democracy Officer:

Name: Tracy Johnson

Contact details:

- Telephone – (01904) 551031
- E-mail – tracy.johnson@york.gov.uk

For more information about any of the following please contact the Democracy Officer responsible for servicing this meeting:

- Registering to speak
- Business of the meeting
- Any special arrangements
- Copies of reports

Contact Details are set out above.

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Holding the Executive to Account

The majority of councillors are not appointed to the Executive (38 out of 47). Any 3 non-Executive councillors can 'call-in' an item of business from a published Executive (or Executive Member Advisory Panel (EMAP)) agenda. The Executive will still discuss the 'called in' business on the published date and will set out its views for consideration by a specially convened Scrutiny Management Committee (SMC). That SMC meeting will then make its recommendations to the next scheduled Executive meeting in the following week, where a final decision on the 'called-in' business will be made.

Scrutiny Committees

The purpose of all scrutiny and ad-hoc scrutiny committees appointed by the Council is to:

- Monitor the performance and effectiveness of services;
- Review existing policies and assist in the development of new ones, as necessary; and
- Monitor best value continuous service improvement plans

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City of York Council

Minutes

MEETING	ECONOMIC DEVELOPMENT PARTNERSHIP BOARD
DATE	26 SEPTEMBER 2006
PRESENT	COUNCILLORS STEVE GALLOWAY (CHAIR), KIRK (VICE-CHAIR), HOLVEY, MORLEY, MERRETT, D'AGORNE AND FRASER (IN PLACE OF BLANCHARD) MR ANDREW SCOTT (FIRST STOP YORK TOURISM PARTNERSHIP), MR MIKE GALLOWAY (EDUCATION/LIFELONG LEARNING PARTNERSHIP), PROF TONY ROBARDS (UNIVERSITY OF YORK), MR MARK SESSIONS (MANUFACTURING SECTOR) AND JULIE HUTTON (YORKSHIRE FORWARD)
APOLOGIES	COUNCILLORS BLANCHARD AND JAMIESON-BALL, MR BRIAN ANDERSON (TRADES UNIONS), MR LEN CRUDDAS (CHAMBER OF COMMERCE), DON STEWART (YORKSHIRE FORWARD) AND MR KEVIN MOSS (FINANCE SECTOR)

PART A - MATTERS DEALT WITH UNDER DELEGATED POWERS

8. DECLARATIONS OF INTEREST

Members were invited to declare at this point in the meeting any personal or prejudicial interests they might have in the business on the agenda.

The following personal non-prejudicial interests were declared at the meeting:

Cllr Holvey is employed by Leeds City Council.

Cllr Morley is a member of the York Tourism Bureau.

Cllr D'Agorne is employed by York College.

Cllr Merrett is employed in the Rail Industry by Corus Infrastructure Services.

9. MINUTES

Minute 4 - Cllr Fraser commented that the fifth bullet point, regarding the disappearance of the semi skilled sector in the labour market, was important considering the recent job losses in York. These were important

jobs to the economy of York and it should be a priority to find a way to replace them. Cllr Fraser requested that his comments be noted in the minutes.

RESOLVED: That the minutes of the last meeting held on 20 June 2006 be approved and signed as a correct record.

10. PUBLIC PARTICIPATION

It was reported that there had been no registrations to speak under the Council's Public Participation scheme.

11. YORK'S LOCAL AREA AGREEMENT - FIRST DRAFT

Members considered a report on the first draft of York's Local Area Agreement (LAA) and which sought endorsement of both the Economic Development and Enterprise (EDE) Block text and outcomes framework.

The report advised that the LAA was a 3-year agreement (refreshed annually) made up of outcomes, indicators and targets, and was effectively a medium-term delivery plan for an area's community strategy. The outcomes framework was structured around four blocks:

- Children and Young People
- Safer & Stronger Communities
- Healthier Communities & Older People
- Economic Development & Enterprise

The first draft of the Economic Development & Enterprise Block of York's LAA was attached at Annexes A and B. Annex A provided an overview of the key issues facing York in relation to economic development, transport and environmental sustainability. Annex B contained the outcomes framework for the Economic Development & Enterprise block. This matrix detailed outcomes to be achieved during the period 2007-2010, and associated performance indicators, targets, lead partners, and potential sources of funding. The full outcomes framework (covering all four LAA blocks) currently contained 52 outcomes with an average of 4 indicators per outcome (totalling 212 indicators). This met Government Office's expectation that the full LAA would contain 40-60 outcomes.

The full first draft of York's LAA would be agreed at the meeting of the LSP on 28 September and submitted to the Government Office for Yorkshire and the Humber (GOYH) in early October.

An updated version of the LAA was circulated at the meeting. Officers informed members that the Press article regarding the Skills and Inclusion section of the LAA had misunderstood the figures in this section. Officers reported that the article claimed that the percentage of people in York with NVQ level 2 was lower than the regional average. However the figure was lower because there were more people at levels 3, 4 and 5, and therefore were better qualified.

The following points were made:

- Concern was raised about how well cross cutting issues joined up across the four blocks and that some issues were not as well coordinated as they could be.
- EDE2 lacked some definition and needed more refinement. It was suggested that 'maximised' be replaced by 'optimised'.
- EDE5.9 or EDE8 should contain an indicator relating to the five areas in the city where residential properties were experiencing high air pollution to show progress made on improving air quality in the areas. It was agreed that this would be picked up in the final draft.
- The wording for EDE6.1 should be altered to show that the quality of events rather than quantity was a concern.
- EDE6.3 could be amended to become a more broader measure consisting of figures from all attractions regarding number of visits.
- It was queried whether new European funds had been taken into consideration or if there was any government funding available. Officers reported that the new European funds probably hadn't been taken into account and at the moment there was no government funding proposed for a successful LAA although there could be future funding streams available.

RESOLVED: That the first draft of both the EDE Block text and outcomes framework be endorsed.

REASON: To progress work on the first Local Area Agreement.

12. PROGRESS ON KEY ISSUES

Members considered a report which identified any matters arising from the last meeting of the Board and briefed Board members on issues/progress in other areas of economic development activity.

The report advised that Jez Willard from the Japanese Shop would replace Brian Littlejohn from Marks and Spencer as the retail sector representative on the Board, once this had been approved by full Council.

Annex 3 of this report, marked as to follow on the agenda, was tabled at the meeting. The Annex provided a summary of the state of the economy in York and highlighted that employment had been growing with over 1500 jobs each year and unemployment was lower than the regional and national average.

The following points were made:

- The job losses recently announced were disappointing but the response had been immediate, with a redundancy support group being provided and a strategic review was being set up.
- It was important to understand the trends in York's economy so that the skills gaps could be addressed.

- The job losses would impact on people's standards of living as there would be a loss of income and lower income jobs would be available in the job centres.
- The robustness of York's economy should be given greater publicity.
- It was agreed that a more detailed view of the figures was needed to understand what jobs were being created and where and how these relate to the job losses.
- There were potential opportunities to investigate, such as green technologies and new sites, which could generate new jobs and allow larger companies that wanted to expand to move into.

Minute 14 contained the Part B Minute (Matters referred to Council) relating to this report.

RESOLVED: (i) That the report be noted and endorsed.

REASON: To help shape the effectiveness of future action.

13. SCIENCE CITY YORK: FUTURE GOVERNANCE

Representatives of the key stakeholders in Science City York (SCY), the City Council, the University of York, and Yorkshire Forward, had met to discuss the longer-term future of the partnership. A proposal had emerged from these discussions to expand the range of activities encompassed by the initiative; to establish it as a company limited by guarantee owned by the stakeholders; and to appoint a chief executive. The Executive Leader endorsed these proposals on behalf of the City Council on the 11th September. This report informed the EDPB of the proposals.

It was reported that a lot of the team had already been recruited, pending the arrival of the new chief executive next year. It was noted that there needed to be more discussions regarding changes to the worldwide economy and how York could find and keep an edge on these developments.

RESOLVED: That the report and the Board's comments be noted.

REASON: In order to gain the views of the EDPB on the proposal to expand the range of activities encompassed by the initiative; to establish it as a company limited by guarantee owned by the stakeholders; and to appoint a chief executive as described in the report.

PART B - MATTERS REFERRED TO COUNCIL

14. PROGRESS ON KEY ISSUES

Members considered a report which identified any matters arising from the last meeting of the Board and briefed Board members on issues/progress in other areas of economic development activity.

The report advised that Jez Willard from the Japanese Shop would replace Brian Littlejohn from Marks and Spencer as the retail sector representative on the Board, once this had been approved by full Council.

Minute 12 contained the Part A Minute (Matters dealt with under delegated powers) relating to this report.

RECOMMENDED:	(ii) That full Council be recommended to approve that Jez Willard from the Japanese Shop be appointed to replace Brian Littlejohn from Marks and Spencer as the retail sector representative on the Economic Development Partnership Board.
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REASON:	To help shape the effectiveness of future action.
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CLLR STEVE GALLOWAY

CHAIR

The meeting started at 6.00 pm and finished at 7.05 pm.

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Economic Development Partnership Board**13 March 2007**

Report of the Director of City Strategy

York Tourism Strategy and Action Plan**Summary**

1. This report outlines the proposed new Tourism Strategy for the City of York, which has been developed by the York Tourism Partnership. The report highlights objectives and priorities for tourism in York over the next few years, based on the fundamental principle of increasing visitor spending and length of stay. This is founded on identifying, meeting and where possible exceeding customer expectations. The report explains how these objectives are to be delivered and identifies key actions. Members are asked for their comments on the Strategy and to endorse these objectives and actions. A report on new organisational structures to deliver these objectives (see paragraph 4) will be brought back to the Economic Development Partnership Board later in the year.

Background

2. Tourism is very important to the York economy. Tourism spending by visitors has risen by 52% since 1993 (to £311.8mn in 2005), and employment has risen by over a thousand jobs in the same period to 9,561 jobs (2005 figures). The value of tourism, or the “visitor economy”, includes both the direct contribution that tourism makes to the economy (in accommodation, attractions, entertainment, shopping, eating out etc) and also the multiplier effect that tourism has in such sectors as printing, publishing, professional services, financial services, food, beverage, construction, laundry/cleaning services etc. Tourism therefore has a big role to play in many people’s livelihoods in York, which is why the First Stop York tourism partnership was founded in 1995 to facilitate, deliver and grow tourism services through public-private sector partnership. This is led by the Council, York Tourism Bureau, the York Hospitality Association and the regional partners Yorkshire Forward and the Yorkshire Tourist Board. Hitherto the First Stop York tourism partnership has been a unique body in tourism service delivery in the Yorkshire Region.
3. Over the past few years there has been considerable discussion on the future direction and organisation of tourism, starting from national government policy (highlighted in the Department for Culture, Media and Sport’s 2004 paper “Tomorrow’s Tourism Today”) which has given a greater role in tourism in recent years to Regional Development Agencies. In the Yorkshire region this review of delivery processes has been led by Yorkshire Forward but with

significant input from the local authorities (including York) and the regional tourism board and has led to the establishment of six sub-regional tourism delivery partners in the Yorkshire region. These will lead on the delivery of a range of tourism services, particularly in the areas of product development, business engagement and marketing of local areas. Yorkshire Forward have set a series of targets and aspirations for the local delivery partners, in return for additional funding starting in 2006-07, with the key overall target for the region being a 5% growth in tourism earnings per annum up to 2010.

4. The partnership in York is based on the First Stop York tourism partnership, but with wider and more formal responsibilities as one of six sub-regional agencies in Yorkshire. A review of the organisation and management of the York tourism partnership, to best deliver actions and objectives, will be the subject of a further paper later in the year, but is likely to lead to the creation of a single tourism delivery organisation in the city, rather than through separate partners as at the moment. This will provide a single voice for tourism in the city and a more visible leadership to champion York. Discussions have been taking place on the governance and structure of such an organisation and further information and confirmation of the way forward will be presented later in the year. In the meantime a number of key activities, including the development of an initial strategy for the tourism in York, can be progressed.
5. One of the first requirements from Yorkshire Forward is the establishment of a tourism strategy for each of the sub-regional partnership areas. Annex 1 forms the draft strategy for the York area, designed to reflect the specific circumstances of tourism in York, as well as ensuring that the city can contribute towards regional tourism targets – the principal one being the 5% per annum growth target. As the Council is a principal partner in developing tourism in York, it is important for the Council to discuss and agree the key objectives and principles.
6. The attached Tourism Strategy outlines the current strengths of tourism in York – very much a success story in the York economy, as demonstrated by the 52% increase in visitor spending from 1993-2005, the growing festivals and cultural offer and substantial commercial investment, especially in the retail, bars and limited service hotel sectors. The Strategy however recognises that in a competitive environment the city needs to be able to respond to internal and external pressures:
 - Recent trends showing falling hotel occupancy in 2006
 - The long term decline in overseas visitor numbers (from a third of York's visitors in 1995-96 to a fifth today)
 - A change in visitor characteristics in the past 2-3 years which reflects an older and less affluent visitor profile (even though visitor spend has continued to increase)
 - Changing visitor expectations and opportunities (through external developments such as low cost flights, alternative leisure spending opportunities etc)

- 7 The Strategy puts forward a series of key objectives for York to aspire to in order to be able to deliver sustainable economic growth through increased visitor spend and length of stay. These objectives include:
 - 7.1 To put the customer at the heart of its activities, establishing what the actual and potential visitors want and ensuring that the city's product is appropriate to their needs
 - 7.2 To have a vibrant and successful visitor economy, with businesses able to deliver the best possible product, marketing and service to the visitor
 - 7.3 To increase the value of tourism earnings in York by 5% per annum to 2010
 - 7.4 To deliver through targeted marketing and promotion the high spending/longer stay visitors that will increase tourism earnings to the city and the region – promotion that reflects the quality of place, product and people in York
 - 7.5 To ensure that the future needs of visitors and residents are taken fully into account in developing the needs of present-day visitors
 - 7.6 To provide on demand up-to-date customer-focused information on York and the region to visitors
 - 7.7 To seek quality, world class investment, innovation and product development in terms of attractions, accommodation, retail, conference facilities and the public realm – paying attention to both the city's daytime and evening offer
 - 7.8 To enhance the quality of existing attractions, building on events and festivals and investing in York's distinctive cultural tourism offer, in conjunction with [York @ Large](#) and other partners
 - 7.9 To promote York as an exemplar in sustainable tourism
 - 7.10 To address the specific skills and training needs of tourism businesses and their workforce, in conjunction with other partners
 - 7.11 To further develop York's influence as a gateway to the rest of the North Yorkshire sub-region and the Yorkshire region as a whole, working with partners to ensure the widest possible benefits from a successful York tourism economy
 - 7.12 Ensuring that the York Tourism Partnership, responsible for driving the Strategy forward in conjunction with the business community and other partners, is "fit for purpose" in delivering that role.
- 8 The strategy proposes a number of measures to achieve these objectives, building on the key elements that the Partnership has pursued since 1995, namely targeted leisure and conference marketing and public relations, market research activity to learn the views of visitors and their economic impact, running the Visitor Information Centres at the Station and De Grey Rooms, and a range of product develop-related activity, led by the Council with partners,

linked to investment in lighting and interpretation projects, support for events and Festivals (including the Festival of Food and Drink and St Nicholas Fayre/Yuletide York Christmas promotion), website development and support for skills development and training.

9 These activities are being augmented by a series of new activities, supported through Yorkshire Forward funding (£666,700 over the next four financial years) which in addition to helping secure the desired organisational changes is being used to:

- identify new market segments (to target marketing resources better)
- identify product needs required to grow our share of these markets (for instance improving the evening economy and increasing investment in interpretation in order to increase the opportunity to lengthen visitor stay and increase spending)
- identify marketing opportunities (to, for instance, business/conference visitors, European visitors and those who use York as a gateway to the rest of Yorkshire)
- work with partners such as Business Link to ensure that York businesses can benefit from and service these new markets.

10 Finally the Strategy identifies a number of longer term activities which will give a greater impetus to the growth of York's "visitor economy" (all the business associated with tourism, both directly and indirectly). These activities include:

10.1 A strategic long-term investment framework, designed to renew and enhance York's visitor offer and encourage the high-spending, long-stay visitor by adding value to their visit. Lead responsibilities rest with a number of bodies, including the York Tourism Partnership but also with other parties. Components will include (though this list is not exclusive):

- Major investment propositions – The Minster East End, York Central, St Mary's Precinct and the Cultural Quarter, Terry's, Castle-Piccadilly etc
- High quality, innovative Visitor Information Centre provision in a better city centre location
- Support for events and festivals as a means of bringing new and returning longer stay visitors to the city – with particular reference to the 2010 York Mystery Plays and activities in the run-up to the 2012 Olympics (contributing to proposals from the Yorkshire region)
- Investment in the quality of place through creative installations, lighting and interpretation, thereby encouraging visitors to stay longer (into the evening and overnight) and spend more money in the city on accommodation and in attractions, shops, restaurants etc. The quality agenda is crucial in encouraging the higher spend visitor – and in addition creates the right environment for residents to enjoy, and

encourages business investment in linking York to vibrancy and success.

- Corridors and linkages between the key attractions, leading to a holistic approach to city centre tourism investment and thereby giving the best prospect for sustainable tourism
- Generating high quality hotel development that will employ additional staff and will service the longer stay visitor

10.2 Ensuring that the marketing and promotion of such investment priorities is taken fully into account, and that the overall marketing of the city, appropriately resourced, is able to promote York to the benefit of all businesses in the city to clearly identified target markets, complementing regional and national marketing activities. The York Tourism Partnership will lead on this.

11 The Strategy is not a document that is set in stone. It acts as a roadmap to a series of objectives, and in highlighting short and long term actions it does highlight areas where, for example, bids may be made through the Sub-Regional Investment Programme or through other agencies and programmes, such as the Heritage Lottery Fund or through encouraging private sector investment. These actions are not exclusive, however, and indeed an important lesson over the past eleven years (since the original First Stop York tourism partnership was established) is how the tourism industry and responsible partners have had to adapt to changing circumstances, whether due to the impact of exchange rates or terrorism, or alternatively social changes such as low cost airlines, the internet or mobile personal technology.

12 The crucial issue is that the York Tourism Strategy is designed to be supported and used by the tourism industry and the city at large. While the York Tourism Partnership has specific service delivery responsibilities, many other organisations, partnerships and businesses will have key roles to play in delivering support to tourism businesses and visitors. The Strategy therefore creates the environment for other organisations and partners, including the commercial sector, to invest in and grow their business activities in York.

13 Related to this, the York Tourism Partnership will work with the wider City of York Council, partnership agencies in the city, such as York @ Large, the City Centre Partnership, Science City York, york-england.com and others to maximise investment and support for improving the quality of the city's visitor experience.

Consultation

14. This strategy has been consulted upon with key tourism businesses in the city, through sub-groups of representatives on marketing and product development activities which are part of the present mechanism for dealing with tourism issues. There has also been consultation within the Council, especially with York Leisure Office, and with the regional agencies Yorkshire Tourist Board and Yorkshire Forward. Results of that consultation are available.

Options

- 15 Members are asked for their comments on the Strategy and to endorse the key objectives in 6 above.

Corporate Priorities

- 16 Tourism in York is a major generator of economic benefits, with one in ten of the local workforce (9,561 people) employed directly or indirectly in tourism in 2005-06. Two of the Council's Corporate Aims are relevant here – Objective 7 “work with others to develop opportunities for residents and visitors to experience York as a vibrant and eventful city” and Objective 3 “strengthen and diversify York's economy and improve employment opportunities for residents”. Strengthening the visitor offer with judicious investment in new products, improved services and better marketing and promotion gives the best chance for York to achieve these goals. The Strategy also reflects the importance of tourism as a generator of economic benefits in the City Vision and Community Strategy 2001-2024, where strategic aims within the “York – The Thriving City” objective include:

To be ranked as an international quality leisure and business visitor destination

To provide a strong and distinctive cultural sector, enriching the lives of residents and visitors.

Implications

- 17 The implications of the Strategy on a number of areas of work have been considered:

- **Financial**

The Strategy has been produced assuming no net increase in tourism expenditure by City of York Council. Increased activity levels is based on additional resources received through Yorkshire Forward at the moment (£666,700 in total from 2006-07 to 2009-2010) and proposals to be brought forward through the Sub-Regional Investment Programme.

- **Human Resources (HR)**

None as yet. The future organisation of the York Tourism Partnership will require consideration of human resource issues, but this will be the subject of another paper later in the year.

- **Equalities**

None. Tourism is very much an industry that welcomes visitors of all characteristics, and future investment (especially capital investment) will be DDA-compliant – this is especially important regarding investment in enhanced visitor information services.

- **Legal**

None as yet. The future organisation of the York Tourism Partnership and its relationship to the City of York Council will require consideration of legal issues, but this will be the subject of another paper later in the year.

- **Crime and Disorder**

This has been considered. Investment in lighting and in the evening economy creates genuine opportunity to improve safety in the evenings by having more people in the city centre, preventing no-go areas. Police and Safer York representatives have been consulted on the formulation of actions to enhance the city's evening offer.

- **Information Technology (IT)**

The new Visitor Information Centre will require high standard ICT connections and there will be continued investment in web-based information services. Funding from a range of sources will be sought for this investment.

- **Property**

Discussions are already taking place with Property Services re: the city centre Visitor Information Centre operation. There are no other property implications at this stage.

Risk Management

18. The final Strategy will contain a risk management assessment, to be completed when the deliberations on a possible new organisational structure are completed. That risk assessment will be brought to a future meeting of the Economic Development Board along with recommendations on the structure. In the meantime the existing partnership will be able to continue to deliver activity, as outlined in paragraphs 8-10 above, as it has done for the past twelve years.

Recommendations

19. The Economic Development Partnership Board is asked to:
 - 1) Make comments on the draft York Tourism Strategy
Reason: This will allow the tourism partners to prioritise actions in future years by setting the context for activity.
 - 2) Endorse the objectives 7.1-7.12 above
Reason: This will enable the tourism partners to best prepare tourism proposals to be put forward into the Sub-Regional Investment Programme
 - 3) Support in principle the establishment of a single tourism organisation to deliver actions subject to a further report on the details of this.

Contact Details

Author:

Ian Tempest
Tourism Manager
Economic Development Group
Tel No. 554427

Chief Officer Responsible for the report:

Bill Woolley
Director of City Strategy

Report Approved *tick* **Date** *Insert Date*
♦ *26 Feb. 07*

Specialist Implications Officers: None

Wards Affected: *List wards or tick box to indicate all*

All ✓

For further information please contact the author of the report

Background Papers:

Earlier drafts of the York Tourism Strategy, and responses to earlier consultation, are held at the Economic Development Group offices in George Hudson Street

Annexes

1. The York Tourism Strategy and Action Plan – Draft (February 2007)

ANNEX 1**YORK TOURISM PARTNERSHIP**

20 George Hudson Street
 York
 YO1 6WR
 Tel: 01904 554433
 Fax: 01904 554429
 e-mail: york.economy@york.gov.uk

**YORK TOURISM STRATEGY AND ACTION PLAN –
 DRAFT FEBRUARY 2007**
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YORK TOURISM STRATEGY AND ACTION PLAN: EXECUTIVE SUMMARY

The York Tourism Strategy examines the city's key objectives, priorities and investment needs from a tourism perspective, seeking to build on the current strengths of York as a visitor destination, whilst also addressing challenges that face tourism in the city and surrounding area.

The Strategy has been developed by the York Tourism Partnership, the public-private sector partnership incorporating the Council, York Tourism Bureau and the York Hospitality Association, whose representatives lead on the overall marketing of York as a visitor destination, and on defining the key product development requirements in the city that will help grow tourism in York and the region.

The Strategy identifies a set of clear objectives for tourism in York, developing the city's visitor economy, increasing length of stay and visitor spending – but in the context of identifying, meeting and exceeding customer/visitor expectations. The objectives emphasise quality considerations, and the need for sustainability

The Strategy identifies the key priorities for tourism, and how they can be delivered, funded and evaluated within a clear timetable. These priorities (and NB this list is not exhaustive) will include:

The core activity of the promotion of York as a visitor destination through a combination of marketing, market research, product development and visitor information activities. The lead for this work rests with the York Area Tourism Partnership, and these services are currently being enhanced.

A strategic long-term investment framework, designed to renew and enhance York's visitor offer and encourage the high-spending, long-stay visitor by adding value to their visit. Lead responsibilities rest with a number of bodies, including the Area Tourism Partnership but also with other parties. Components will include:

- Major investment propositions – The Minster East End, York Central, the Cultural Quarter, Terry's
- High quality, innovative VIC provision
- Support for events and festivals as a means of bringing new and returning longer stay visitors to the city – with particular reference to the 2010 York Mystery Plays and activities in the run-up to the 2012 Olympics (contributing to proposals from the Yorkshire region)
- Investment in the quality of place through creative installations, lighting and interpretation
- Corridors and linkages between the key attractions
- Generating high quality hotel development

- Developing the York as a Gateway theme by creating marketing campaigns with other TPs, especially in North Yorkshire, encouraging involvement from out of town businesses and addressing shortfalls in the regional transport service.

Ensuring that the marketing and promotion of such investment priorities is taken fully into account, and that the overall marketing of the city, appropriately resourced, is able to promote York to the benefit of businesses in the city to clearly identified target markets, complementing regional and national marketing activities. The York Area Tourism Partnership will lead on this.

Creating the environment for other organisations and partners, including the commercial sector, to invest in and grow their business activities in York.

Related to this, the York Tourism Partnership will work with the wider City of York Council, partnership agencies in the city, such as York @ Large, the City Centre Partnership, Science City York, york-england.com and others to maximise investment and support for improving the quality of the city's visitor experience.

Ensuring that the city can make a full contribution towards regional and national tourism targets.

Capacity building to help the York Area Tourism Partnership provide leadership for tourism, deliver a challenging programme of activities to create investment in the city and increase visitor expenditure and length of stay. This will enhance the core activities delivered through the tourism partnership:

- high quality tourism promotion and information services
- targeted product development activities
- supporting events and festivals
- business and skills development.

This will as a consequence maximise the economic benefit that tourism brings to the city

YORK TOURISM STRATEGY AND ACTION PLAN

1 Introduction

York is one of the UK's and Yorkshire's premier visitor destinations.

For the visitor, the city offers much to enjoy, with many and world famous attractions, high quality accommodation services, a growing cultural and festival offer and constantly developing retail, café and restaurant facilities. All this is underpinned by one of Europe's finest heritage environments, set in a compact city centre that reflects 2000 years of history.

Tourism cannot stand still in the modern world, however, as visitor tastes change, the marketplace for leisure time and the leisure pound becomes increasingly competitive and technological change makes a profound difference to the way that any destination is experienced, and how it delivers its services. This is as true for York as it is for any visitor destination and indeed York has itself experienced, even in the context of a world class historical environment, considerable change in the past ten years.

In order, therefore, to maintain its position as a premier visitor destination, the City of York needs to look strategically into the future, examining its key objectives, priorities and investment needs. This process is about safeguarding its current strengths, whilst at the same time adapting to future requirements.

As well as the city's importance in its own right, York also has a crucial role to play in helping to deliver regional and national tourism targets – a role the city is well placed to deliver with 3.84 million visitors and spending now running at £311.8mn per annum (2005 figures). This Strategy therefore needs to complement and contribute towards key regional objectives as outlined in the Strategic Framework for the Visitor Economy (published by Yorkshire Forward) and the Regional Tourism Marketing Strategy (published by the Yorkshire Tourist Board)

The principal agency responsible for delivering the objectives outlined in this Strategy is the York Tourism Partnership, a public-private sector partnership which leads on the overall marketing of York as a visitor destination, and on defining the key product development requirements in the city that will help grow tourism in York and the region.

This Area Tourism Strategy is designed to be embraced by the tourism industry and the city at large as while the York Tourism Partnership has specific service delivery responsibilities, many other organisations, partnerships and businesses will have key roles to play in delivering support to tourism businesses and visitors.

2 York Tourism Strategy and objectives

In order to achieve these objectives, the York Tourism Partnership has devised this Area Tourism Strategy, which establish what are the key objectives for York tourism in the next few years in order to grow the value of the visitor economy in the York area. Similar plans for their own areas are being drawn up by other subregions in Yorkshire and Humber.

This draft York Tourism Strategy therefore outlines the key objectives and priorities of York tourism over the next five years, ensuring that the city is able to develop a successful and

sustainable visitor economy for the benefit of businesses, visitors, employees and residents.

The context for this is a clear series of objectives:

- 2.1 To put the customer at the heart of its activities, establishing what the actual and potential visitors want and ensuring that the city's product is appropriate to their needs
- 2.2 To have a vibrant and successful visitor economy, with businesses able to deliver the best possible product, marketing and service to the visitor
- 2.3 To increase the value of tourism earnings in York by 5% per annum to 2010
- 2.4 To deliver through targeted marketing and promotion the high spending/longer stay visitors that will increase tourism earnings to the city and the region – promotion that reflects the quality of place, product and people in York
- 2.5 To ensure that the future needs of visitors and residents are taken fully into account in developing the needs of present-day visitors
- 2.6 To provide on demand up-to-date customer-focused information on York and the region to visitors
- 2.7 To seek quality, world class investment, innovation and product development in terms of attractions, accommodation, retail, conference facilities and the public realm – paying attention to both the city's daytime and evening offer
- 2.8 To enhance the quality of existing attractions, building on events and festivals and investing in York's distinctive cultural tourism offer, in conjunction with [York @ Large](#) and other partners
- 2.9 To promote York as an exemplar in sustainable tourism
- 2.10 To address the specific skills and training needs of tourism businesses and their workforce, in conjunction with other partners
- 2.11 To further develop York's influence as a gateway to the rest of the North Yorkshire sub-region and the Yorkshire region as a whole, working with partners to ensure the widest possible benefits from a successful York tourism economy
- 2.12 Ensuring that the York Tourism Partnership, responsible for driving the Strategy forward in conjunction with the business community and other partners, is "fit for purpose" in delivering that role.

3 Delivering these objectives

The York Tourism Partnership (York TP) has the principal role in the city of York in ensuring that the city can deliver these priorities, by working with a number of partners and agencies. This will build on the well-established tourism partnership, First Stop York, which comprises the City of York Council, York Tourism Bureau, and the York Hospitality Association. The York TP is one of six sub-regional delivery agencies in the Yorkshire

and Humber region which are working towards a series of common objectives (see Annex 1)

The function of the York TP is to create the environment through public-private sector partnership, for the continued development of tourism in York and the surrounding area. This will ensure that tourism remains an effective and successful contributor to the York economy. It will lead on defining and securing investment to develop the quality of the York product, and market York as a destination to the leisure and business visitor including domestic and overseas markets. The overall project for the York TP is designed to help achieve the Yorkshire Forward target of 5% per annum growth in tourism earnings and allow York to become an exemplar of good practice.

This opportunity to establish a new Tourism Partnership in York will significantly enhance the organisation and activity of the existing partnership to enable it to fully function as a TP and to contribute to this growth target. A single organisation, replacing the existing partnership of different organisations, will deliver a more co-ordinated approach to tourism activities, creating a single voice for tourism and a single voice of contact, integrating operations that will bring greater efficiency and reduced costs. Progress is being made on such issues as governance, structure and staffing, but further work on operations and relationships, especially with the City Council (inevitably a key partner) is required. Further information and confirmation of a way forward will be presented later in the year.

The forward strategy of the York TP will be to continue to grow and develop the private sector engagement with the partnership, deepening the level of support, to continue significant investment from the public sector (through City of York Council), and to seek external funding for specific projects, through Yorkshire Forward or other bodies, that will secure the long-term future of York as a premier visitor destination.

An analysis of the regional and local strategic context is included in Annex 2 below.

An important aim of the York Tourism Strategy is very much to support the ambitions and intentions in these national, regional and local strategies, building on the strengths and influence of York as a major international visitor destination which is capable of creating and absorbing growing visitor expenditure whilst safeguarding the environment which brings some four million people to the city each year.

4 Tourism in York and Yorkshire

Tourism is extremely important to the local, sub-regional and regional economy. Yorkshire Forward estimate that tourism contributed £4.2bn to the economy of Yorkshire and the Humber in 2003, and in York itself independent research from the University of York shows that £311.8mn was spent directly and indirectly in York by the city's 3.84 million visitors in 2005. Around a third of those visitors spend time in other parts of Yorkshire during their current visit to York, enjoying the countryside, coast, Harrogate and the cities.. This money is spent by visitors in shopping (£93mn), hotels, £84mn), eating out (£44mn), visiting attractions (£29mn), evening entertainment (£9mn) and on local transport (£5mn). The rest of the economic impact is the multiplier effect of tourism on the local economy (£47mn) – demonstrating that the influence of tourism is wide and that it creates a genuine "visitor economy". Further information on current tourism trends is in Annex 3 below.

In a competitive economic environment locally, regionally, nationally and internationally it is important that York is able to maintain and increase the prosperity of its tourism industry, on which one in ten of the local working population (9,500 people) depend.

This prosperity cannot be taken for granted – Yorkshire Forward’s keynote document “A Strategic Framework for the Visitor Economy” highlights the threats of “a background of tough competition for the leisure pound and much greater choice for our potential visitors”. In York recent evidence suggests that the city is increasingly seeing older and less affluent visitors showing that York’s visitor economy has ample potential to perform even more strongly if more higher income, younger visitors can be encouraged to come as well as the existing visitor market.

In order to further the development of the visitor economy in York and Yorkshire the key sub-regional delivery agencies are required to develop Area Tourism Strategies to identify and agree priorities.

5 Actions to deliver strategic objectives (items 1-14 in the Action Plan)

This Tourism Strategy covers a variety of activities that York requires in order to be able to deliver challenging growth targets in a sustainable way. An Action Plan follows (in section 8) but the following material provides more detail

The core activities of the existing First Stop York Tourism Partnership in helping to deliver these objectives are as follows:

5.1 The promotion of York as a visitor destination has been the core activity of the FSY tourism partnership for many years. This work includes the following projects:

- A detailed programme of leisure and conference marketing, and PR opportunities, including work with travel journalists and travel operators
- Market research – a visitor survey and economic impact assessment
- The running of two Visitor Information Centres in York – one at the station and the other in the De Grey Rooms (though it will be moving in the lifetime of this Plan to an alternative location closer to the city centre)
- Product development related activities, including investment in lighting and interpretation projects, support for events and festivals, specific promotions associated with Christmas, investment in website development and maintenance and support for skills development and training.
- The Partnership is also the principal conduit for consultation with York’s tourism industry on major planning, transport and development issues

5.2 The Partnership is now enhancing these activities in the context of the changing economic environment in York, and changes to the structure of tourism delivery services in the Yorkshire region. These additional activities include:

- The evaluation of current and the identification of new market segments to ensure York is best placed to meet its targets and objectives

- Identifying the product needs required to achieve these markets - and the means of delivering this product (either directly or by influencing other agencies and the private sector)
- Identifying marketing opportunities to promote existing and new product to the target markets (a combination of business tourism, European and day visitor marketing, PR and activities which use York as a gateway to elsewhere in the region). This will include gauging reaction in those target markets.
- Ensuring businesses are equipped to benefit from and service this market – working in its own right and with other agencies on business support services, skills development, training etc.
- Ensuring that the Tourism Partnership organisation has the capacity carry through this long-term development planning and analysis as well as delivering the core activity as in 5.1 above
- Evaluation back into market segmentation analysis (feedback loop)

A start has already been made on these additional activities, with projects linked to innovation and enhancement of the York offer in the short and longer term. This includes:

- Research and evaluation on such themes as market segmentation, conferences, the evening economy, branding and benchmarking with other destinations. This can include where appropriate research with non-visitors or potential visitors.
- Short-term investment in lighting/interpretation projects, developing the quality of York's public realm and existing attractions
- Business/conference tourism proposals, developing the high spending business tourism sector, including links with the science-based association market (through the Science City York project)
- Sub-regional priorities, to be developed in partnership with the other North Yorkshire ATPs.

The promotion and marketing of these initiatives to visitors will be incorporated into each activity.

5.3 Finally, the Tourism Partnership has a series of strategic roles to perform, again linked to the objectives in 2 above:

- Engaging with tourism businesses and other influential parties, including the City of York Council and partners such as the City Centre Partnership, ensuring support and buy-in for activities
- Influencing and responding to other national, regional and local strategies which impact upon tourism in York and the surrounding area

- Securing funding for the implementation of the Area Tourism Strategy from both public and private sector sources
- Evaluating York's tourism performances against the aspirations laid down in this Area Tourism Strategy.

6 Key issues and priorities for future investment (items 15 and 16 in the Action Plan)

Recently there has been a review of sub-regional priorities being undertaken right across the York and North Yorkshire economy, starting with a Strategic Economic Assessment (SEA), which will lead later in 2007 to the production of an updated Sub-Regional Investment Plan (SRIP) for the sub-region. As part of that work, tourism will be seen as a priority in the light of its contribution to the sub-region's economy and the SRIP is likely to include a number of investment themes.

Similarly a variety of funding routes – by no means purely Yorkshire Forward – need to be examined. These will include:

- Other public sector investment (including the City Council, Learning and Skills Council, Local Transport Plan etc)
- Partner funding (York Minster, York Museums Trust, NMSI etc)
- Private sector (major hotels, and businesses as part of membership organisations)
- Heritage Lottery Fund

The following key areas for investment have been identified so far by the York Tourism Partnership. NB This is not an exclusive list – further proposals or modifications to these proposals will follow the consultation and discussion on this York Tourism Strategy, and the requirement outlined above for market segmentation analysis – but it should provide a starting point for discussion.

In many cases the lead organisation on the investment is not the Partnership itself, but other agencies – this reflects the co-ordinating role of the Partnership.

6.1 Strategic long-term investment framework

- Principal components:

i) Major investment propositions

- Minster East End (see below)
- National Museum of Science and Industry at York Central – led by the NMSI and endorsed by the Tourism Partnership. Potential for a new visitor attraction, improved hotel and business tourism facilities etc well related to the National Railway Museum, the Station and the Central Business District
- Cultural Quarter (Yorkshire Museum, Museum Gardens, Art Gallery etc) – led by York Museums Trust and endorsed by the Tourism Partnership. Transforming St Mary's Abbey Precinct, increasing physical and intellectual

access to the precinct and collections, celebrating world class cultural heritage and motivating extra spend and longer dwell time by visitors.

- Other development sites, including Terry's, Hungate and Castle-Piccadilly with significant potential visitor impact in terms of hotel, retail and visitor attraction or information service uses

ii) Minster East End: potentially York's headline/feature tourism investment priority for the next 10-15 years – led by York Minster, but endorsed by the Partnership.

- the world class block around which other elements fit.
- high quality, high value added
- development of a long term "attraction" using the restoration as the catalyst.
- major international interest generated by the restoration.
- create a "must do" and innovative visitor experience around the restoration, for example:
 - create presentation and access to the window and stonework – observation platform and telling the story creatively (using York's creative technology companies)
 - outdoor cinema in College Green, using the scaffolding as the screen – commercial interest and adding to the evening economy
 - annual commission for cutting edge public art/creative lighting – building on Patrice Warrener and using the whole of the East End scaffold as the canvas
 - illuminating the Minster through a single architectural lighting scheme – major impact and interest

iii) High quality, innovative, Visitor Information Centre provision – led by the York Tourism Partnership.

- Develop a successful and sustainable visitor information centre for York with wide appeal that also acts as a showcase for the region to promote further the twin aspects of tourism and regional diversity.
- Develop a new blueprint for tourist information provision in the 21st century, one that is financially viable, effectively managed and has strong partnerships with its suppliers and customers.
- Leading edge, ground-breaking
- Building on work that has been carried out with Yorkshire Forward support over the past year.

- iv) Support for events and festivals as a means of bringing new and returning longer stay visitors to the city – with particular reference to the 2010 York Mystery Plays and activities in the run-up to the 2012 Olympics (contributing to proposals from the Yorkshire region). The York Tourism Partnership will work with established partners such as the York Early Music Festival, the organisers of the York Festival of Food and Drink and with the City of York Council and others through the City of Festivals initiative led by York @ Large.
- v) Investment in the quality of place through a combination of renaissance and technology-based, creative installations, lighting and interpretation, whilst addressing fundamental services for visitors such as signage, public facilities etc. The York Tourism Partnership will work with Illuminate York, Creative industries networks, City Centre Partnership City of York Council and others on delivering this investment.
- responds to the Yorkshire Forward “quality of place” agenda
 - builds on York’s existing strengths, and initiatives previously supported by Yorkshire Forward on lighting and interpretative schemes.
 - enhances York’s Science City reputation
 - opportunity to combine funds and provide a showcase for York’s creative businesses
 - strong, long-term marketing message: York being innovative
 - “safer, cleaner, greener city” linkages
 - clear implications for extending the evening economy – and therefore extending the length of stay of visitors
- vi) Generating high quality hotel investment by creating the commercial conditions for such investment. The York Tourism Partnership will work with hotel operators and City of York Council on identifying sites and opportunities for such development, which meets the accommodation requirements of the high spend, long stay target visitor market
- targeting key operators
 - a major quality gap in York’s offer
 - spinning off from the investment priorities highlighted above
 - complementing the high value, added value principle highlighted in the Minster proposition.

In order to most effectively exploit this long term investment agenda, this needs to be marketed and promoted to potential visitors, and the delivery of this will be led by the York Tourism Partnership.

There are also business and skills development issues that arise from these proposals as well as land use and physical investment issues. The York Tourism Partnership will work with Business Link, the Learning and Skills Council and other agencies on addressing these requirements

7 Geographical focus

The focus of this Area Tourism Strategy is defined by the City of York in the way that it acts as a primary visitor destination and business generator for much of the region. Data prepared for the Tourism Marketing Strategy for Yorkshire and Humber 2006-2010 confirms that York is a premier brand, with the city well at the top of a list of top Yorkshire destinations for weekend breaks, short breaks or holidays. York as a destination influences and extends to locations, destinations and attractions well outside the city, including the sub-region of York and North Yorkshire and beyond – over a third of York visitors go on to other parts of Yorkshire during their current stay.

The primary focus of this Strategy is therefore very much on the York brand, and thus the City of York. The aspirations of the Strategy will benefit the other Tourism Partnerships and destinations elsewhere in Yorkshire who will benefit from a strong York brand and strong York activities, thereby complementing the Yorkshire brand. York, through the regional tourism delivery network, is committed to working jointly where appropriate with other tourism partnerships, and will explore with them opportunities for joint marketing and promotion, thereby building on York's crucial gateway role

Administrative arrangements are outlined further in Annex 4 but will be subject to further discussion by the ATP partners in the near future.

8 Action Plan

The combination of activities required to implement ideas in this Area Tourism Strategy is outlined in summary form below. In the case of longer term priorities (as outlined in 6 above) these will be discussed in the context of the Strategic Economic Assessment and the Sub-Regional Investment Plan

Action Plan

In order to deliver the activities in sections 5 and 6 the York TP will be working to a detailed plan of activity which is presented in summary form below

Ref No	Actions	Relates to objectives in section 2 of the Plan	Costs in 2006-07	Income (+source)	Timing	Delivery (under present FSY partnership)	Targets	Comment
1	Leisure marketing	2.3, 2.4	387K	327K Bureau 55K CYC 5K bookability	Through 06-07	Bureau with partners on specific projects	Individual targets for each campaign have been set, based on booking numbers. Marketing contributes to overall objective of 5% per annum growth in visitor spend.	Activities include: Visitor Guide, Mini-Guide, What's On publication, visitoryork.org website, winter short breaks campaign, Britain's Heritage Cities USA campaign, York Pass, e-newsletter etc
1A	Groups and trade marketing	2.3, 2.4	In above		Through 06-07	Bureau with Board as partners on projects	Ditto	Groups/Travel Trade Guide, Joint YTBoard campaign, trade and carrier familiarisation visits, group accommodation booking service, groups website, group e-news campaign, travel trade/group travel exhibitions
2	Conference marketing	2.3, 2.4	58K	43.5K Bureau 15K CYC	Through 06-07	Bureau	Ditto	Conference guide, venue finding service, conference website, e-marketing campaign, exhibitions, showcase, fam visits, England's Heritage cities, business tourism joint campaigns, delegate accommodation service
3	PR activity	2.3, 2.4	51K	5K Bureau 46K CYC	Through 06-07	Bureau	Media coverage targets: 20 pieces in national press, 45 pieces regional outside Yorkshire, 26 pieces in Yorkshire, 52 pieces local, 10 overseas, 10 travel trade/conference 150mn circulation total, £2.5 mn advertising equivalent	Media pack, press visits (themed and reactive), York Update e-newsletter, events news, press enquiries, features, Tourism Times newsletter, Image Library

Ref No	Actions	Relates to objectives in section 2 of the Plan	Costs in 2006-07	Income (+source)	Timing	Delivery	Targets	Comment
4	Regional marketing and support functions	2.3, 2.4, 2.11, 2.12	32.3K	32.3K CYC	Through 06-07	Board	Series of targets set by the Board which the ATP need to agree	Activities will include: Marketing campaigns, Constitutional issues – e.g. the formal roles ATPs will play in tourism delivery, as well as the Board's lobbying activities, VIC support, Market Intelligence, Nexus/Englandnet, Quality assurance,
5	Core market research	2.1, 2.5, 2.9	11	11 CYC	Through 06-07	CYC	1000 visitor survey interviews, presentations to industry groups etc. Completion of the Economic impact Model in June each year	Visitor survey and Economic impact model. See also 12 below.
6	Visitor Information Centre service (see also 15.5 below)	2.1, 2.3, 2.6	126 plus income	55K CYC 71 Bureau	Ongoing	Bureau on behalf of the York TP		Core activity based on the two VICs in the De Grey Rooms and the Station (see also 15.5 below)
7	Events related activity	2.3, 2.7, 2.8	93	£18.25 CYC £38K markets £36.75K other sources (YHA, tickets, sponsorship etc)	Festival of Food and Drink is 22 Sep –1 Oct but spend is throughout the year.	Festival of Food and Drink – Hospitality Assoc. and CYC Tourism Events Fund – sub-group of PDG	Festival of Food and Drink: 120,000 visitors. Economic Impact of over £5mn.	Festival of Food and Drink is organised by York Hospitality Association. Tourism Events Fund supported selected festivals and events which meet criteria linked to encouraging the high spend, longer stay visitor
8	Christmas promotion	2.3, 2.7, 2.8	18.25	£10.25 CYC £8K advertising	Ongoing	CCP/CYC through PDG	500,000 visitors to York over the six weeks Christmas period. £37mn spend estimate	Huge money earner for the city. Major benefits to the retail community. Increases visitor spend
9	Skills and business engagement	2.2, 2.10	28.8	4.5 CYC 24.3 YHA (includes income from running courses)	Ongoing	YHA through PDG	To be confirmed but we need to contribute to Yorkshire target of 2000 days training per annum	Various activities related to: Recruitment of staff into tourism (including schools liaison and promotion of the jobsinyork website) Provision of training services Retention of staff – Awards for Excellence Personnel Forum Working with the Hospitality CoVE Representing skills development issues

Ref No	Actions	Relates to objectives in section 2 of the Plan	Costs in 2006-07	Income (+source)	Timing	Delivery	Specific, practical research projects which will lead to activities elsewhere designed to respond to the trends revealed.	Comment
10	Product development issues	2.5, 2.6, 2.7, 2.8	6	3.5 CYC 2.5 sales income from trails	2006-07	CYC through PDG	Income generation from the sale of trails so they become self-funding Successful replacement of outdated "Welcome to York" city centre maps	3.5K is going (from PDG budget) towards the replacement of city centre map panels. 2.5K is the target sales income from the trails – this will enable PDG to produce more trails.
11	Capacity building to ensure the ATP delivers its requirements	2.3, 2.11, 2.12	21K	Yorkshire Forward (YF) ATP contract	2006-07 – but resources requested for next 3 yr as well	FSY Executive	Making the new structure fit for purpose as an ATP A schedule of review criteria has been identified by Yorkshire Forward – review in October 2007 – first milestone will be March 2007.	Enhancing the FSY organisation and structure to meet ATP requirements. Starting with a facilitated workshop, begin to work through if/how the existing structure needs to be revised, and examine options for developing the organisation, including staffing/space requirements. Ensure the partnership can deliver long term investment (see activities under 15 below) and can continue to deliver tourism promotion, events and festivals, information services and product development activity
12	Additional research and evaluation	2.1, 2.5, 2.9	44.7K	Yorkshire Forward (YF) ATP contract	2006-07 but more limited activity in next 3 yr as well	CYC	Various research targets include: ensuring market segmentation work produces results that will help marketing activity, ensuring evening economy research assists the development of an Evening economy strategy etc.	Research projects will include: Market segmentation research and promotion, Branding research and promotion (including research with non-visitors), Evaluation, Conference research, Quality assurance research, Benchmarking
13	Marketing activities	2.3, 2.4	52K	Yorkshire Forward (YF) ATP contract	2006-07 with activity in each of the next three years	Bureau	Combination of business tourism, European and day visitor marketing, plus PR and activities which use York as a gateway to elsewhere in the sub-region	All marketing activity to complement the regional marketing activity of the Yorkshire Tourist Board

Ref No	Actions	Relates to objectives in section 2 of the Plan	Costs in 2006-07	Income (+source)	Timing	Delivery	Target	Comment
14	Short term investment priorities – lighting and interpretation, York Minster, city centre maps, Gourmet Yorkshire project linking food in York and N Yorkshire	2.5, 2.6, 2.7, 2.8	104	Yorkshire Forward (YF) ATP contract	2006-07 plus limited resources in 2007-08 – but aim is to secure funding from SRIP review	CYC with partners	Contribute to the 5% per annum growth target of visitor spend, increase length of stay of visitors, increase awareness of York attractions (and of York/sub-region's food produce)	Capital investment in lighting and interpretation schemes, building on previous successes. Lighting, Bootham Bar, Illuminating York event, Moonlight Cinema, York Minster East Front project, promoting York and Yorkshire food produce, festivals and markets....
15	Long term investment priorities:							These are all subject to the review currently being undertaken of North Yorkshire sub-region's SRIP, and further details will emerge as market segmentation work takes place (see 11 above)
15.1	Major investment propositions – The Minster East End, York Central, St Mary's Cultural Quarter, Terry's, Castle-Piccadilly etc	2.3, 2.4, 2.5, 2.7, 2.8, 2.9, 2.10, 2.11	tbc	SRIP review	2007-08 onwards with some feasibility work in 06-07 with partners?	CYC plus individual partners	Increase in long stay, high spending visitors – increase tourism earnings by 5% per annum	Major development projects which are complex, long-term and substantial in nature. All will require development funding from a number of different sources, including Heritage Lottery Fund but all will have a major impact on York in terms of growing and diversifying the city's tourism offer.
15.2	Minster East End	2.3, 2.4, 2.5, 2.7, 2.8, 2.9, 2.10, 2.11	Tbc	SRIP review	2007-08 onwards	CYC plus Minster	Increase in long-stay, high spending visitors, increasing tourism earnings by 5% per annum	Potentially York's headline tourism investment priority over the next 10-15 years. High quality, high value tourism, building on international interest generated by the restoration with other features improving presentation, interpretation, illumination and welcome.
15.3	High quality, innovative VIC provision	2.1, 2.3, 2.6	Tbc	SRIP review, VIC business plan, private sector contributions?	2006-07 start with business plan and physical planning issues – build in 2007-08	VIC Strategy Group – Bureau/CYC	Increase footfall from 240,000 to 400,000 and increase turnover by x%	Investment necessary to create a successful and sustainable visitor information centre for York with wide appeal that also acts as a showcase for the region. Step change improvement of York VIC services, with regional implications as a "hub" operation.

Ref No	Actions	Relates to objectives in section 2 of the Plan	Costs in 2006-07	Income (+source)	Timing	Delivery	Targets	Comment
15.4	Support for events and festivals	2.3, 2.7, 2.8, 2.9	0	SRIP review, projected ticket sales	2007-08	CYC/event organisers	Specific targets for events and festivals re: attendance and, especially, economic impact	Include 2010 Mystery Plays and other major events. Also link to 2012 Olympics and Cultural Olympiad.
15.5	Investment in the quality of place through creative installations, lighting and interpretation	2.3, 2.5, 2.6, 2.7, 2.8	tbc (NB builds on item 13 above)	SRIP review	2007-08 onwards (building on work starting in 06-07 – see 13 above)	CYC	Increase in long stay, high spending visitors – increase tourism earnings by 5% per annum	Various different capital project options linked to lighting and interpretation themes which started a few years ago. Addresses the quality of place issue.
15.6	Corridors and linkages between the key attractions	2.3, 2.5, 2.6, 2.7, 2.8,	tbc	SRIP review	2007-08 onwards	CYC	Increase in long stay, high spending visitors – increase tourism earnings by 5% per annum	Based on a “Landmark” lottery scheme this will physically link major locations in the city, from York Central, through Museum Gardens, and the Cultural Quarter/St Marys, linking to the Minster and precinct and then across to the Castle area.
15.7	Generating high quality hotel development (both new and encouraging investment in existing hotels).	2.1, 2.2, 2.3, 2.7, 2.9, 2.10, 2.11	tbc – link to capacity building	SRIP review – plus £mn from private sector investment	2006-07 start the process by identifying resource needs to facilitate this	CYC	Increase 3 star plus hotel Bedstock in the city by x% over the next five years.	Targeting hotel operators, spinning off from other investments and confirming York’s quality agenda of targeting the high value customer
16	Further marketing and promotion of new activities.	2.3, 2.4	tbc – building on core marketing activity in 1-5 above.	SRIP review – a marketing/ promotion component needs to be included in all items 13, 14 and 15.	As appropriate for each separate project		Increase in long stay, high spending visitors – increase tourism earnings by 5% per annum	Building on core marketing activity, using current and future investment to help promote the city to different markets, or to previous visitors who’ve not been to York for a while.

9 Monitoring mechanisms

Performance management is essential in ensuring that the York Tourism Strategy develops and secure results for a number of different customers and stakeholders:

- Visitors
- Members of the Bureau and the Hospitality Association
- Regional agencies, e.g. Yorkshire Forward and the Tourist Board
- The business community in general
- Residents
- Politicians and the local authority
- Funding agencies (where not included above)
- People working in the tourism industry

When finalised, the York Tourism Strategy will contain specific targets, against which performance and progress will be monitored. The exact targets will, amongst other things, reflect those of Yorkshire Forward (for the whole of Yorkshire); Local Strategic Partnership targets; and the specific priorities for York and the surrounding area as outlined in the Area Tourism Plan above.

MONITORING MECHANISMS

Ref No	Target	Monitoring
1	5% per annum growth in tourism earnings	Economic Impact Model (baseline 2005-06) – based in information through visitor survey (expenditure), hotel occupancy information, Bedstock figures, visitor attractions data, car park/park and ride data
2	Maintain employment in the tourism sector at 9000 jobs per annum	Calculated from the Economic Impact Model (spending on different categories equates to a set number of jobs)
3	Market activity – various	Returns on investment are calculated for individual marketing campaigns
4	Regional target is 80% of accommodation businesses to be inspected by 2010 – need a York target	“Quality in Tourism”
5	Communication as a partnership with York’s tourism industry	Quarterly newsletters with the tourism industry – annual meeting with the tourism industry – feedback evaluation to be devised
6	Increase the length of stay of visitors by 1% per annum	Length of stay monitored through the Economic impact Model
7	Secure £x of additional funding investment into York each year from Yorkshire Forward, HLF and other public/commercial/private sector sources.	Monitoring of investment in the city. Preparation of bid proposals to YF, HLF etc. Seek resources through the Stage III ATP process for dedicated investment resource.
8	Secure 100 days of training per annum for York’s tourism industry.	Monitoring of training services through York Tourism Training – run on behalf of the partnership by York Hospitality Association

9	100% sign-up to the principles of sustainable tourism by businesses	Agree a statement of principles (in conjunction with Yorkshire Tourist Board) and circulate as a commitment to members of York Tourism Bureau.
10	Achieve demonstrably higher levels of visitor satisfaction	Use measures of visitor satisfaction in the Visitor Survey including information on likes and dislikes about York, enjoyment of York compared to other places visited, and frequency of intended visits to York

The objectives of Tourism Partnerships.

This is a summary of core objectives which are standard across all the Tourism Partnerships in the North Yorkshire sub-region. Other, specific objectives of the York TP are outlined in the main York Tourism Strategy (pages 4-5 above)

- To complement tourism activity undertaken at a regional level by Yorkshire Forward and Yorkshire Tourist Board.
- To maximise the cost effectiveness of tourism services delivered by the ATPs
- To increase the economic contribution that tourism makes to North Yorkshire and York
- To ensure that the benefits of tourism are environmentally and socially sustainable
- To develop the profitability, and quality of tourism businesses through staff development and training, and business support
- To maximise the satisfaction and quality of experience for visitors, both pre and during their visit
- To develop new products and improve the quality of existing products in line with market demand
- To coordinate provision of information to visitors before, during and after their visits
- To assist partners in visitor management to ensure that the interests of visitors, communities and the environment are kept in balance

Strategic context.

The York Tourism Strategy needs to acknowledge and build on York's gateway role to the rest of the sub-region. National, regional and sub-regional tourism can only benefit from York as a successful and ambitious visitor destination.

The York Tourism Strategy takes account of Yorkshire Forward's recently published **Strategic Framework for the Visitor Economy** as a primary context-setting document. This takes account of regional strategies such as the Regional Economic Strategy (RES) and the Regional Spatial Strategy (RSS), and reflects the national priorities and targets set out in the Department for Culture, Media and Sports' "Tomorrow's Tourism Today" which inter alia sets a national tourism earnings growth target of 4% per annum to 2010 from a 2002 baseline. The Strategic Framework provided by Yorkshire Forward sets an even more challenging earnings growth target for the Yorkshire region of 5% per annum to 2010

The sub-regional context has been developed more fully as three Tourism Partnerships are now established in the North Yorkshire sub-region - York, Moors/Coast and Dales/Harrogate. The York TP is already very active in the sub-region and in Yorkshire as a whole. A quarter of York Tourism Bureau's members are based outside of York, reflecting that fact that over a million of York's four million annual visitors extend their stay and visit the wider region. Investment in the York product will undoubtedly benefit the North Yorkshire sub-region and Yorkshire as a whole. Companies based outside York recognise the value of affiliating themselves with the York brand and buying into York marketing initiatives. The York Tourism Partnership seeks to develop mechanisms to achieve wider engagement and joint action with other interests in the sub-region. York will certainly seek to work actively with the other ATPs in North Yorkshire.

The harnessing and involvement of the private sector is a key aim of Yorkshire Forward and York is in a stronger position than most ATPs in Yorkshire to engage with and lead the industry.

The **Regional Economic Strategy** establishes six objectives for the region:

- growing the region's businesses,
- achieve higher business birth and survival rates
- attract and retain more public and private investment in the region
- achieve a radical improvement in development and application of education learning and skills.
- connect the region's communities through targeted regeneration activity
- enhance and utilise the region's physical and environmental assets

and six cross cutting themes:

- good environmental practice
- social inclusion and diversity
- applying geographic adaptation – linking urban and rural areas
- partnership
- creativity, innovation and technology
- employment and skills needs

Tourism in York makes a vital contribution to these factors. It benefits urban and rural areas and the potential to contribute to the economic future of those areas is essential in long term development plans. A sustainable approach will prevent tourism from undermining the environmental assets on which it is based. Making commercial use of York's historic assets – very much stimulated by York's visitor economy – is one of the best methods of ensuring that historic buildings are maintained. The RES acknowledges that sub-regional and local intervention and funding support for tourism will be delivered through the sub-regional investment plan. Good environmental practice in tourism will be promoted through minimising impact on resource use, promoting sustainable travel – hence the focus on visitor management, encouraging visits to the city by train, promoting the use of park and ride services etc - and creating niche markets in cycling and walking based tourism (York has promoted walking trails in the city centre for years).

Regional Tourism Marketing Strategy. This is led by the Yorkshire Tourist Board and leads the marketing response to Yorkshire Forward's overall target of increasing the value of tourism earnings in Yorkshire by 5% per annum by 2010. The Strategy requires the region (and York) to outperform national growth levels and improve its competitive position within the tourism market. Key challenges (and how York can help deliver this regional strategy) include:

- Delivering the best return on investment (targeted marketing to deliver high value in return for marketing expenditure is equally a requirement in York as it is in the region, and key objectives of attracting a higher proportion of business tourism, international visitors and high value visitors from the core domestic market are endorsed)
- Delivering a world class experience (emphasis on quality in the competitive marketplace. Investment proposals being put forward in this Action Plan will help ensure those quality standards)
- Delivering a compelling brand position (reinforcing the Yorkshire brand with key sub-regional destination brands such as York. In practice the York brand is much stronger than purely a sub-regional brand, so we will continue to focus on York marketing and York product as the best means of generating businesses for the city and sub-region, whilst at the same time working with the Yorkshire Tourist Board on appropriate projects)
- Inspiring and securing visits in a competitive market. (customer focused approach is needed and a variety of delivery channels, from print and on-line materials to working with partners and other agencies). York's marketing strategy reflects these priorities.

The Regional Spatial Strategy sets regional priorities in terms of location and scale of development. It sees tourism as a key part of the economy, and sees the RSS as promoting the role and development of tourism in the region. Within this economic context, for York the key aim of "strengthening the role of existing city and town centres as a key focus of commercial activity" is important, as is the environmental aim to "safeguard and enhance ... the historic environment"

The Major Events Strategy, being developed by Yorkshire Forward and the Yorkshire Tourist Board seeks to capitalise on the economic importance of events and festivals. They intend to develop a business plan to seek to build and grow new and existing events,

and to bid for other events to the region. A number of York events already fit the “major events” criteria (which include having an economic impact of at least £1mn, international/regional TV coverage, links to strategic priorities in the Regional Economic strategy and having the potential to develop and grow) while other forthcoming events (such as the 2010 York Mystery Plays) will also qualify. From a tourism point of view events bring thousands of extra visitors to York (155,000 in the case of Royal Ascot at York in 2005) and considerable economic benefits (spend associated with the York Festival of Food and Drink in 2006 was estimated at c£7mn) so York will wish to play a full part in the Major Events Strategy.

The local context

Tourism in York as a generator of economic benefits features strongly in the key city strategies. The City Vision and Community Strategy 2004-2024 (“Without Walls”) includes under “York – The Thriving City” as one of its top-level objectives: “to support the progress and success of York’s existing businesses and to encourage new enterprises in order to maintain a prosperous and flourishing economy that will sustain high employment rates”.

Within that objective there are two strategic aims for York which impact on tourism:

- “To be ranked as an international quality leisure and business visitor destination”
- “To provide a strong and distinctive cultural sector, enriching the lives of residents and visitors”

The City of York Council’s third Corporate Aim seeks to “strengthen and diversify York’s economy and improve employment opportunities for residents” while Corporate Aim 7 seeks to “work with others to develop opportunities for residents and visitors to experience York as a vibrant and eventful city”

Finally in the Corporate Strategy Priorities in 2006-09 there are three that relate to tourism:

“Improve the actual and perceived condition and appearance of the city’s street, housing estates and publicly accessible spaces” (relates in part to central area quality of space)

“Improve people’s skills and knowledge to improve future employment prospects” (relates in part to the skills agenda for tourism)

“Improve the way the Council and its partners work together to deliver better services for the people who live in York” (relates to better partnership working)

Again tourism plays a vital role in helping achieve these objectives for the City of York, and these strategies confirm the city’s and the Council’s continuing support for and endorsement of tourism as an economic generator for York.

YORK – TOURISM TRENDS 2005-06 (UP TO JUNE 2006)

Summary

York tourism had a striking year in 2005-06 with fewer visitors (down 2.7%) but expenditure by the visitors nonetheless rose significantly (by 8% in real terms). Those visitors who did stay in York were staying for longer. Employment numbers increased as well – to over 9,500.

The growth in expenditure is very striking when York is currently attracting relatively older and less affluent visitors. As long as they are able and willing to spend money in York then this visitor group is clearly valued, but York has ample potential to perform even more strongly if more higher income, younger visitors can be encouraged to come to York as well.

1 Visitor numbers and spending in 2005.

Economic Impact Model results are through for 2005. Key points (NB still provisional)

- **Visitor numbers** DOWN by 2.7% to 3.843 mn
- **Length of stay** of overnight visitors UP 7.5% from 3.05 to 3.28 days
- **Total income from tourism** UP by c10% to a record £311.8mn - basically the fewer day and overnight visitors actually spent much more. This is a real increase of 8% taking account of inflation.
- Tourism generated **9,561 jobs** in 2005 - an increase of 700 on 2004.
- These estimates EXCLUDE the initial impact of Ascot - but will include the effect of those subsequent visits which were brought about by the presence and coverage of Ascot in York.

2 Visitor characteristics in 2005-06

- **Overseas visitor numbers** to York have slipped back to 19% (81% UK), however the proportion of American visitors was 6% higher than in 2004-05 – also there were more visits from Australia and New Zealand.
- There has been a significant recovery for **Manchester Airport** as an entry point for the overseas visitors who do come to York (26% v 14% in 2004-05) – also Leeds-Bradford Airport is doing proportionately better (7% v 1% in 2004).
- Of **UK visitors** there were fewer from London/SE than in the previous year (15% v 20% in 2004) and more from the rest of Yorkshire/Humber (28% v 22% in 2004).
- **Travel to York** - For all visitors coming to York, the city now has a record 28% coming by train (up 5% on 2004-05), with 60% coming by car (down 5%). This demonstrates the message to travel by train has been very successful.

- **Visitor characteristics** - The trend in recent years towards older and less affluent visitors continued in 2005-06 with almost as many visitors over 65 (19%) as there are under 34 (20%). Visitor representation in the highest income groups has fallen steadily over the last four years (from 28% of all visitors to 18%). This does not, however, mean that visitors are necessarily spending less: see above.
- The traditional likes of York (for history, museums and interesting buildings) remain strong – but people also like the variety of things to see and do and enjoy food/restaurants and pubs. This suggests that visitors have a **positive, lively perception** of York
- The great majority of visitors are **repeat visitors** (76%) – but many haven't been to York for more than five years, so are not aware of all the changes to York that there have been in recent years.
- For people who obtained **information** before they came to York then the internet is by far the main source (62% of such people use the net). Once people get to York then the main source of information they use is the Visitor Information Centre (45%).
- Over a third of **visitors to York go on to other parts of Yorkshire** during their stay – Harrogate and the Yorkshire Coast were singled out this year, as well as the countryside. This highlights the importance of York as a gateway to the rest of the region.
- When asked about **nights out** in York half of the staying visitors do spend time in York in the evenings – mainly dining out – but the second largest visitor activity in the evenings is the ghost walks. There has been a very positive reaction to improved city centre lighting schemes (82% of people who've seen the lighting see this as attractive/beautiful, or as adding to the city's atmosphere).

3	Hotel occupancy figures.
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The very latest information (January-November 2006) suggests that hotel occupancy trends have been disappointing in 2006 (down a few percentage points each month compared to the same period last year), though this data, through the Tourist Board, is based on a sample of hotels so results may be affected by the sample size. In contrast the number of visits to attractions has generally been greater on a month-by-month basis in 2006 compared with 2005.

YORK TOURISM 1995-2007

Tourism Action Plan produced July 2005, when the First Stop York Tourism Partnership was established. First Visitor Survey October 1995.

Key facts on progress from 1993 (last date of statistics before FSY) and 2005:

	1993	2005	Difference
Average length of stay (days)	2.7	3.28	+21.5%
Total number of nights stayed by visitors:	1.56mn	1.97mn	+26.2%
Visitor spending (£mn)	205	311.8	+52.1%
Employment (jobs)	8397	9561	+13.9%

What was York tourism like in 1995?

Attractions	No City Screen cinema in Coney Street No NRM extension (The Works) No Jorvik refurbishment Neither of the major new grandstands at York racecourse were open No Millennium Bridge Bar Convent still to open as a museum/attraction No National Centre for Early Music BUT: Friargate Waxworks Museum, the "old" City Screen with a limited programme, Impressions Gallery and York Arts Centre were still open
Shopping	No Monks Cross or Designer Outlet shopping centres No Borders Books or other new shops in Davygate Marks and Spencer was still being expanded in Parliament Street - and no Home store in Coppergate either No Virgin Store, Mango, French Connection etc
Nights out	None of the "new bars" - Slug and Lettuce, Bar 38, Pitcher and Piano, Orgasmic, Casa, Living Room, Harkers, Ha-Ha, Varsity etc No open air pavement cafes
Accommodation	No budget hotels in York at all, either on the outskirts of York or in the city centre. Accommodation stock (bedspaces) principally guest houses and B&Bs No Conference Centre at the Royal York Hotel
Getting to/around York	No A1/M1 link road round Leeds No brown signs on A1/A64 Only two park and rides
Marketing	Effectively, no internet Similarly no e-mails Very few mobile phones No dedicated tourism PR (or conference?) resource We had three TICs run by two separate organisations - Guide Friday and the Bureau
Events	No Festival of Food and Drink No Residents First Weekend St Nicholas Fayre existed - established in 1992 - but there was no wider Christmas promotion of York. No Chinese, Roman or Science Festivals.

The visitors were different, too:

- Over a third of our visitors were from overseas - and over half of them were from North America.
- Far more stayed in guest houses than in 3 star standard accommodation.
- York had more visitors aged 35 or less than 55 plus.

Some dates:

First Residents First Weekend: January 6-7 1996

First Festival of Food and Drink: 20-28 September 1997

First full scale Christmas promotion – 1997 (St Nicholas Fayre started in 1992)

A brief schedule of key dates/actions since 1995

1995	FSY tourism partnership established (no formal date - Strategy dated "July 1995") Visitor Survey starts October 1995 Brubakers in Blossom Street installs 10 computers linked to the internet
1996	First Residents First Weekend: 6-7 January 1996 York Racecourse Tattersall Grandstand officially opens Bar Convent museum reopens Marks and Spencer store refurbished in Parliament Street Establishment of York Tourism Training Three year European Funding through Konver to boost marketing and product development activities Friargate Wax Museum closes
1997	First Festival of Food and Drink: 20-28 September Out-of-town budget hotels arrive: Holiday Inn Express and Travel Inn First pre-Christmas shopping campaign (to expand St Nicholas Fayre)
1998	ECOFIN (20-22 March 1998) First Stop York website launched - www.york-tourism.co.uk (now www.visitork.org) First dedicated tourism PR resource (through FSY and York Tourism 2000) Slug and Lettuce opens - and The Quarter Monks Cross and McArthur Glen out-of-town shopping centres open. Production of the first trails guides to draw attention to many distinctive features of York (medieval churches/bar walls)
1999	The Works, £4n extension to the NRM, opens. Borders Books opens (and other shops in Davygate) Coffee chains start to open - Starbucks, Costa Coffee, Coffee Express etc - and pavement cafes A1 brown signs erected York Arts Centre closes
2000	3 November - floods reach their highest levels - business in York set back for six months Railway connections problems with huge national railway inspection programme National Centre for Early Music opens Rawcliffe Bar P&R opens City Screen opens Queens Hotel (the first of the city centre budget hotels) opens Royal York Hotel conference centre opened in September FSY-run TIC service begins

2001	<p>Foot and mouth affects overseas visitors to UK</p> <p>Millennium Bridge opens</p> <p>More budgets - Quality Hotel, Premier Lodge</p> <p>Jorvik Centre reopens after £5mn redevelopment</p> <p>Designer Outlet P&R opens</p>
2002	<p>Ramada Encore opens</p> <p>Wetherspoons (Piccadilly) opens</p> <p>First Christmas Lights switch on show outside the Minster</p> <p>York Museums Trust launched</p> <p>Admission charges dropped at the NRM</p>
2003	<p>Funding secured from Yorkshire Forward for major investments in lighting and interpretation of the city.</p> <p>LSC funding for extra training initiatives in the city.</p> <p>York Minster charges for admission</p>
2004	<p>Railfest - plus £600K new footbridge from York Station to the NRM</p> <p>Flying Scotsman</p> <p>whatsonyork website</p> <p>First Chinese Festival</p> <p>First Roman Festival</p> <p>Monks Cross P&R opens</p> <p>New stores in Stonegate Walk</p> <p>County stand at York racecourse opens</p>
2005	<p>Royal Ascot at York</p> <p>Creation of York as a City of Festivals</p> <p>The Living Room opens</p> <p>City Art Gallery reopens after a £500K refurbishment</p> <p>Impressions Gallery closes</p> <p>Launch of DisabledGo website</p> <p>Many new activities being showcased to develop the evening economy in the city (ongoing - launch in October)</p> <p>Guy Fawkes 400</p> <p>Refurbishment of the station Visitor Information Centre (November)</p> <p>New shops opening in Spurriergate (December)</p>
2006	<p>Relaunch of the ARC as DIG (March)</p> <p>Yorkshire Wheel (April)</p> <p>Constantine Exhibition at the Yorkshire Museum (March) and 1700th anniversary of the proclamation of Constantine as Roman emperor</p> <p>Cold War Bunker opens (English Heritage, May)</p>
2007	<p>Illuminate York event in January 2007 showcased artistic and architectural lighting in the city</p> <p>42 bed Hotel du Vin will open on The Mount</p>

The organisational context

This York Tourism Strategy is being put together by the York Tourism Partnership, established (as the First Stop York tourism partnership) with a Memorandum of Understanding and a series of procedures that have developed over twelve years. These arrangements will change especially, as one of the six Tourism Partnerships in Yorkshire and Humber, it now has a formal role within the structure set out by Yorkshire Forward at sub-regional and regional level. Changes will include the funding of the ATP (through the combined presentation of the budgets of the three organisations) and an examination of the different stakeholder interests of the partner organisations, with an opportunity ultimately to create a single organisation.

Current arrangements (subject to change)

Principal decisions for the Tourism Partnership are made by an Executive, which meets six times a year. Decisions of the Executive are endorsed by the respective Boards of the Hospitality Association and York Tourism Bureau, and by the Economic Development Board (a partnership board responsible for the development of economic policy and strategy in the City of York, which includes Council and private sector representation). Council Leader Steve Galloway is the Executive Member for Economic Development so has regular discussions with the Chair of the Partnership's Executive. Cllr Charles Hall has been nominated to provide Council Member input to the Partnership.

The current arrangements are being reviewed early in 200 to ensure that the partnership is "fit for purpose" and is able to review its existing functions whilst progressing the range of additional activities outlined in sections 5 and 6 of the main report.

**CONNECTING THE YORK AND THE REGIONAL TOURISM STRATEGIES:
LINKS BETWEEN THE YORK TOURISM STRATEGY AND THE STRATEGIC FRAMEWORK FOR THE VISITOR ECONOMY**

The Strategic Framework document links directly to the Regional Economic Strategy and also with other regional (and national) strategies. There's an analysis of where the region is now (industry is worth £4.2bn to the regional economy in 2003 and the performance in growing expenditure is better in Yorkshire than most other English regions). The North Yorkshire Sub-Region's rate of growth is now slower than in other parts of the region – NB West Yorkshire has seen a high level of tourism earnings from day visitors. Yorkshire doing less well in terms of the % of overseas visitors (c7% of its total income) and from lower than average spend from business visitors.

York's position is somewhat different. Visitor spend (direct and indirect) in 2005-06 was +10% over the same figure in 2004-05, and expenditure overall has risen by 52% between 1993 and 2005. Overseas visitor ratios (at c20%), though well below the levels in the mid-1990s (33%) are still much higher than the regional average.

The following analysis takes up the main priorities and objectives in the Strategic Framework document and identifies where the draft York Tourism Strategy will help to achieve them. There's much more detail in the draft Strategy itself.

Priority	Objective	Link to York AT Strategy
Sustainable tourism	To achieve growth in the visitor economy which is consistent with the principles of sustainable development	Looking to increase value over volume as has been achieved over the past twelve years (where visitor spending rose by 52.1%, though numbers fell by 2.8%). Continued working with partners and promotion of park and ride and rail travel to York on websites and in print materials, now to be augmented by public coach service to Leeds Bradford Airport . Ensuring continued economic use of heritage sites – through investment projects that will help key attractions reinvent themselves and ensure their long term viability. Increase dwell time in attractions through investment in new services/interpretation etc that will encourage people to stay longer in the attraction and in York Events and festivals based on indigenous strengths (e.g. Festival of Food and Drink very much showcasing local/Yorkshire produce),

Supporting innovation and product development	To be proactive in fostering innovation in tourism and support “step change” development of the tourism product	<p>A number of proposals meet that requirement: New VIC – step change improvement in services as a clear opportunity to promote to far more people the visitor experience in York and Yorkshire (making the most of York’s existing gateway role) and increasing footfall from 250,000 to 400,000 Minster East End York Minster - major attraction with nearly a million paying visitors (2005). They are looking to build on the current substantial conservation project with new interpretation facilities, complete new entrance into the attraction, major improvement to visitor facilities (including extensive disabled access). An iconic building which is a place of worship and a world-famous visitor attraction. Investment will enhance the quality of the visitor experience and by its very nature (supporting a huge conservation project) meets the sustainability agenda. York Central, Cultural Quarter – all investment to help increase dwell time. Continued investment in lighting and interpretation – opportunity to increase the length of stay of visitors into the evening through enhancing the evening offer. Seeking to work with Science City and other partners</p>
Quality and Quality of Place	To achieve increases in visitor satisfaction by improving quality of place and quality of product	<p>Commitment right through the Area Tourism Plan. Examples: Investment in lighting and interpretation schemes. Major investment planned; York Central, Cultural Quarter, Minster East End Linking key investments Working with the private sector to generate high quality hotel investment New VIC Monitoring of quality standards through benchmarking of visitor opinions Development of events that meet the criteria of major events</p>
Business growth, Development and Skills	<p>To support business growth and innovation in tourism through the Better Deal for Business framework</p> <p>Develop the entrepreneurial and business skills of the tourism workforce and improve the general skill level in tourism</p>	<p>Working with the York Hospitality Association on skills development projects (e.g. staff recruitment through website, encouraging retention of staff through Tourism Awards which promote good employment practices in tourism and training initiatives) Working with the CoVEs for Hospitality, and Travel and Tourism, to ensure that the requirements for employers are being addressed through this important investment in skills. Working with partners (e.g. Business Link) on initiatives to encourage business advice and support. Networking and communicating with businesses to encourage the exchange of good practice.</p>

The Information Base and Market Intelligence	To improve the quality of data available to support long-term planning and assist businesses to be more competitive.	<p>Additional research projects have been identified on 06-07 including market segmentation work (identifying key target markets), branding (which will help businesses plug into the York brand), conference tourism research, work analysing the evening economy etc.</p> <p>York is also committed to taking an active part in any region-wide projects which will see to achieve a consistent approach to ensuring the economic impact of, or quality standards in, the regional tourism industry</p>
Visitor Information.	To gain a strong competitive edge for Yorkshire and Humber by providing state of the art information services	Plans for a state of the art Visitor Information Centre in the city centre which will be a gateway to the rest of the region. This will form a really strong opportunity to showcase Yorkshire to a high footfall of visitors. Funding options for such a development are being explored.
Marketing	<p>Increase earnings from tourism by targeting high spending visitors</p> <p>Develop the marketing strategy to deliver the principles of sustainable tourism</p>	<p>The existing marketing plan reflects these priorities and these are being taken into account in current market segmentation process.</p> <p>Specifics: Dedicated business/conference promotions (value of business/conference sector to York has been estimated at £50mn (2003-04 figures) but has the potential to grow The events strategy makes it explicit that support will favour events appealing to the high spend/long stay visitor Specific marketing of new, quality product investments York marketing strategy will dovetail in with the Board marketing strategy which already follows these principles. Sustainable tourism: focused on off-peak season, staying visitors and promotion of access to York via public transport</p>

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Economic Development Partnership Board**13 March 2007**

Report of the Director of City Strategy

Northern Way Growth Fund 'Hub and Spoke' Project**Summary**

1. The objective of this report is to bring members up to date with a major Science City York (SCY) infrastructure project funded through a Northern Way initiative designed to improve the level of innovation across the three Northern Regional Development Agencies regions. This £2.6 million project is funding three developments in the City. These facilities will provide much needed business accommodation and collaboration facilities within Science City York's three focus clusters.

Background

2. The Science City York Business 'Hub and Spoke' project is a major innovative and integrated infrastructure initiative across the City but is part of a greater aim to extend business growth and knowledge transfer across the Northern Way regional development agencies i.e. Northeast, Northwest and Yorkshire and Humberside. The purpose is to accelerate and maximise continued growth and development in knowledge-based business in bio - science, digital and creative technology clusters.
3. Northern Way in cooperation with Yorkshire Forward (YF) has allocated approximately £2.6 million to strengthening this region's knowledge base contributing to realising SCY's vision of generating 15,000 new jobs by 2021 and creating new businesses and nurturing collaborations and joint ventures between business and academia.
4. The funding is split into two tranches, one of £500 K to be spent prior to 31st March 2007 with a further £2.1million to be spent prior to 31st March 2008. The project will include three business focussed infrastructure developments based at strategic sites in the City offering fully flexible incubation and grow on space to address existing market deficiencies and demand for high specification facilities to meet the specific needs of cluster businesses. In doing so, it will support the development of SCY 'Hub and Spoke' model.

The Key components of the SCY 'Hub and Spoke' are:

1. SCY 'Business Hub' –providing specialist business mentoring and support services to nurture and develop early stage businesses - separately

supported through the Sub Regional Investment Plan supported by YF to the value of £2.85 million over 4 years.

2. 'Spokes'- these are initially to be based at three sites within the City of York and include the following elements designed to meet specific cluster and research requirements; the intended sites are:
 - Creative and Digital Centre based in a 40000 sq ft new build 5 storey office on the Terry's Chocolate Works development. This will provide a wide range of office space (250 sq.ft. - 2000 sq.ft.) for young companies to start and grow. Northern Way funds will be used to fit the base building out to a high standard of fit out and flexibility of office sizes and space to meet the exacting requirements of this sector.
 - Biological Business Centre (BBC), a 550 sq ft collaboration/networking facility based within the University's Department of Biology. Northern Way funding will provide the resources to fully fit out the facility.
 - Park Central, a 5000 sq ft in- fill building between the Innovation and Bio Centre on the York Science Park. This will provide additional office and exhibition space as well as Café/networking facility open to businesses on the Park. Northern Way resources will make a significant contribution to this building being completed.
5. A substantial part of the funding (some £1.8million out of the total of £2.6 million) is programmed for the Creative and Digital Centre on the Terry's site.
6. Project support structures have been put in place to assist the SCY/Council team deliver, this includes professional property advisors CBR Ellis and Leeds based Shulmans solicitors.

Consultation

7. SCY have consulted widely both regionally with Yorkshire Forward and City wide with the University and the Science Park to bring this project forward. Colleagues within the City Strategy Directorate have been fully engaged with the project especially with input to the planning review for the overall Terry's development.

Options

8. This report is for information only and therefore does not present options for decisions by Board members.

Analysis

9. The project provides infrastructure to the holistic approach to business development offered by the SCY team .The elements of the project to be supported by Northern Way funding have been researched to ensure there is a need and this has been reviewed in the Yorkshire Forward appraisal process.

Corporate Priorities

10. Science City York forms a major thrust of the Council's corporate priorities especially in the area of economic development. This infrastructure project is supportive of the greater role SCY is set to play in a wider regional framework as it becomes a stand alone entity (Company Limited By Guarantee) with Stakeholders input reinforced in the new framework

It should be noted that the project meets four of the criteria in the Councils improvement statements Dip 5, Dip 6, Dip 8 and Dip 12.

Implications

11. The project has implications in the following areas where senior managers are aware and working with SCY.
- **Financial** –The City of York will be the authorising body for expenditure on this project with significant input from YF. Methodologies are in place for auditing the expenditure for the three elements and legal contracts will be put in place between each element and the Council/SCY.
 - **Human Resources**- No issues
 - **Equalities** – No issues
 - **Legal** – The Legal Services team are aware of the procedures being considered and put in place to manage the project .The legal, property and financial aspects of this project are significantly inter linked and will require a joined up approach.
 - **Crime and Disorder** – No issues
 - **Information Technology (IT)** –No issues
 - **Property** – No issues

Risk Management

12. The project has delivery risks associated with it, particularly regarding the contractual arrangements for drawing down the Northern Way funding and protecting the public interest in this funding, pending decisions to be made on relevant planning applications.

Recommendations

13. The Partnership Board's input and endorsement is requested.
- Reason: To help shape the effectiveness of future actions in order to bring benefits to the economic well being of the City and in meeting the City's corporate priorities which are designed to focus effort on improving the economy.

Contact Details

Author:

Paul Taylor
Interim Project Director
Science City York
Tel No: 01904 554424

Roger Ranson
Assistant Director Economic
Development & Partnerships
Phone No: 01904 551614

Specialist Implications Officer(s)

Not applicable

Wards Affected:

All ✓

For further information please contact the author of the report

Background Papers: None

Annexes: None

Chief Officer Responsible for the report:

Bill Woolley
Director of City Strategy

Report Approved	<i>tick</i>	Date	<i>Insert Date</i>
	◆		26 Feb. 07



Economic Development Partnership Board13th March 2007

Report of the Director of City Strategy

Science City York: Establishment of Company Limited by Guarantee Plan**Summary**

1. The report outlines the current progress in establishing the Science City York Company Limited by Guarantee.

Background

2. The expectation is that the company will be formally established by the end of February, in time to appoint the Chief Executive in early March. A formal meeting of the Members and Directors of the new company will be required in early March. The intention is to establish a company as a legal entity that is capable of employing the new Chief Executive. It is intended to undertake the minimum that is required to achieve this purpose. Once established, and with the advice of the new Chief Executive, the company will consider the governance arrangements required in the longer term, appoint additional directors, and amend the Memorandum and Articles of Association as desired.
3. Local solicitors have agreed to undertake the legal work required to set up the new SCY (CLG), to act as the initial Company Secretary, and to provide the new company with the independent legal advice needed before appointing the Chief Executive. They will draw up draft Memorandum and Articles of Association based upon clauses standard to most companies. The "Objects" clause for inclusion in the Memorandum is based upon text previously agreed by SCY. The company will be known as Science City York Limited. At the time of writing this report, it is intended to have achieved registration of the company by 28th February.
4. Following formal registration of the company the City of York Council and University of York will become the sole members. This will leave the two stakeholders in full control of the company. Both the City Council and the University are arranging for formal decisions to become members of the SCY Company, and to appoint their representatives. The initial registered office of the company will be the office of the company secretary. This is normal practice.
5. The City Council is drafting the contract of employment for use by the company, and the funding agreement for the grant payment to the company, to cover the cost of the Chief Executive and associated office costs. If required the independent solicitors will be able to give independent advice to the company on

these documents. There have been preliminary conversations with local accountants about setting up an initial simple financial management system and payroll arrangement for the SCY Company, which received a helpful response.

6. Formal meetings of the company Members and Directors will be required in early March. A Member meeting (of the City and University) will be required to appoint Directors. A Directors meeting will be required to approve the appointment of the selected Chief Executive; to approve the contract of employment; and to accept the offer of finance from the City Council. That meeting or a subsequent one will be needed to select and appoint a Company Secretary and auditors, and to agree banking and other management issues.
7. The process as described will deliver a formally established and registered company, with appropriate legal and financial systems and guarantees in place, in time to appoint the Chief Executive.
8. The company will be controlled by the two stakeholders who will need to act in concert. During this initial stage, when the company is purely a vehicle for employing the Chief Executive, the stakeholders alone are directors. The existing Stakeholder Group will continue to meet to consider the key decisions guiding the company. Any formal decisions required from the company can subsequently be taken by the two directors, in formal SCY company meetings to follow a Stakeholder Group meeting.
9. It will, of course, be possible for the new company, controlled by the stakeholders, to change any of these arrangements, as well as any detail of the Memorandum and Articles, at any time in the future. In particular the company will need to develop and agree the governance arrangements which will be required for the company in the longer term, when it undertakes a wider range of activities, some of them with attached commercial risk. The Stakeholders have previously indicated that *inter alia* they would seek the advice of the new Chief Executive on these matters. This suggests a timeframe of six to nine months before the final arrangements are in place.

The Board is asked to note the progress in establishing the Science City York Company Limited by Guarantee.

Consultation/Options and Analysis

10. This report is being provided for information and there are no recommendations requiring further consultation.

York Corporate Priorities and LSP Objectives

11. York's economic priorities are firmly embedded within the Council's corporate priorities and the Without Walls initiative.

* The "Thriving City" theme of the WOW Community Plan has the following strategic objective:

“To support the progress and success of York’s existing businesses and to encourage new enterprises in order to maintain a prosperous and flourishing economy that will sustain high employment rates.”

* The Council’s corporate objective 3 – “strengthening York’s economy”, sets out the following strategic objectives:

- Generate business growth and start-ups in science, creative tourism and other key business sectors to protect existing jobs and provide higher quality, sustainable and higher paid jobs.
- Attract investment to strengthen the city’s high growth sectors and generate quality jobs.
- Promote pride in the city, high quality services and products, and safe/fair practices among York businesses.
- Create a vibrant city centre through a proactive partnership approach to visitor management and by increasing investment.
- Ensure that the University and other higher education providers contribute to business growth and generate quality jobs and underpin skills-training opportunities for local people.
- Collaborate with regional and sub-regional partners in providing a complementary approach to infrastructure provision, including new/improved transport/communication links, to generate new business activity and jobs.
- Support residents into learning and work, and improve skill levels in key areas of the economy.

12. In addition, the Economic Development Service Plan identifies a number of priorities, including DIP6: Improve the contribution that Science City York makes to economic prosperity.

Implications

13. There are currently no Financial, HR, Equalities, Legal, Crime and Disorder, IT, Property, or Other implications. Implications for York – and for current areas of activity - can be assessed as the Company is formed and the Chief executive appointed. Progress will be brought to future meetings of the Board.

Risk Management

14. In compliance with the Council’s risk management strategy. There are no risks associated with the recommendations of this report.

Recommendations

15. The Board is requested to note and endorse this report.

Reason: to help shape the effectiveness of future action.

Contact Details

Author:

Roger Ranson
Assistant Director Economic
Development
Phone No: 01904 554420

Chief Officer Responsible for the report:

Bill Woolley
Director of City Strategy

Report Approved

Date 27 Feb. 07

Specialist Implications Officers: None

Wards Affected: *List wards or tick box to indicate all*

All

For further information please contact the author of the report

Background Papers: Report to the City of York Council Executive, September 2006

Annexes: None



Economic Development Partnership Board

13th March 2007

Report of the Director of City Strategy

Sub-regional Investment Plan

Summary

1. The report outlines the current position in producing a revised Sub-Regional Investment Plan (SRIP), allowing the Board (representing the Local Strategic Partnership) to comment on key issues emerging from the strategic framework for the Sub-Regional Investment Plan.

Background

2. The current, agreed, Sub-Regional Investment Plan runs to March 2009 and, for York and the wider York area, includes major investment priorities such as York Central, Science City York, tourism investment (related to the new Area Tourism Partnerships), and the City Centre. The fifth major investment priority for York, Heslington East, was a priority in the SRIP but funding came from regional resources. This also was the case for Visitor Information Centre investment. In future an integrated approach will be taken. The attached table sets out current projects in York funded through the SRIP.
3. Yorkshire Forward have decided to review SRIPs in the year following the review of the Regional Economic Strategy (RES). The RES was reviewed in 2005. There is a general desire to produce a 'Better SRIP' moving towards commissioning a smaller number of investment programmes (rather than a larger number of individual projects). While the York & North Yorkshire SRIP has always provided a broad rationale/framework for the projects that it contains, the view within the sub-region is that the Plan needs to be more strategic and focused in identifying priorities – and where intervention and/or “transformational” action should be focused.
4. So far, work on producing a revised SRIP has focused on undertaking a Strategic Economic Assessment – from which the priorities for investment should emerge – and, in parallel, producing an overall strategic framework/vision for the whole of the sub-region. This work is being coordinated through Jonathan French at the York & North Yorkshire Partnership Unit who has now provided a paper (attached) setting out transformational themes for the Investment Plan review.
5. A meeting has been held with partners to discuss the York Spatial Area component on the Investment Plan review. The initial draft list of suggested interventions include:
 - Infrastructure for Science
 - The York Innovation Hub

- Strategic sites and premises
- Worklessness
- Culture and Tourism
- Connectivity

At present, further work is being undertaken to define issues and outcomes for these interventions.

6. Whilst work is being undertaken on the Investment Plan review, it should also be noted by the Board that Yorkshire Forward are consulting on a proposal to move away from a Sub-regional approach to investment planning being undertaken on a City region basis. It is likely that this matter will be considered further by the Yorkshire Forward Board at its meeting in March 2007.
7. **The Board's comments on the transformational themes raised in the attached paper are invited – to be fed into the continuing work on the Investment Plan review.**

Consultation/Options and Analysis

8. The Board's discussion of these issues forms part of the consideration of options for the SRIP review – further analysis will take place within the sub-regional SRIP process.

York Corporate Priorities and LSP Objectives

9. York's economic priorities are firmly embedded within the Council's corporate objectives and the Without Walls initiative.

- * The "Thriving City" theme of the WOW Community Plan has the following strategic objective:

"To support the progress and success of York's existing businesses and to encourage new enterprises in order to maintain a prosperous and flourishing economy that will sustain high employment rates."

- * The Council's corporate objective 3 – "strengthening York's economy", sets out the following strategic objectives:

- Generate business growth and start-ups in science, creative tourism and other key business sectors to protect existing jobs and provide higher quality, sustainable and higher paid jobs.
- Attract investment to strengthen the city's high growth sectors and generate quality jobs.
- Promote pride in the city, high quality services and products, and safe/fair practices among York businesses.
- Create a vibrant city centre through a proactive partnership approach to visitor management and by increasing investment.

- Ensure that the University and other higher education providers contribute to business growth and generate quality jobs and underpin skills-training opportunities for local people.
 - Collaborate with regional and sub-regional partners in providing a complementary approach to infrastructure provision, including new/improved transport/communication links, to generate new business activity and jobs.
 - Support residents into learning and work, and improve skill levels in key areas of the economy.
10. This highly-focused approach – identifying key priorities that have generated real economic change in the city – needs to be reflected in the sub-regional strategy and eventual SRIP if York’s full potential is to be realised (sustaining York’s economic success and maximising its influence across a wider area). The Board can reflect these priorities in responding and making an input.

Implications

11. There are currently no Financial, HR, Equalities, Legal, Crime and Disorder, IT, Property or Other implications. Implications for York – and for current areas of activity - can be assessed as the strategy and future SRIP emerges. Reports will be brought to future meetings of the Board.

Risk Management

12. It is expected that existing commitments and contractual arrangements within the existing SRIP will continue, and that the two SRIPs will run in parallel from April 2007. The review opens up opportunities to focus resources on key areas: additional funding/investment in the tourism/cultural area for example could result from this process. Also, extended funding for the City Centre Business Improvement District from April 2008, and for Science City from April 2009 could emerge. Long-term funding for York Central also needs to feature in the revised plan.

In compliance with the Councils risk management strategy the main risks that have been identified in this report are those which could lead to the inability to meet business objectives (Strategic) and to deliver services (Operational) and failure to meet stakeholders’ expectations (Governance).

Measured in terms of impact and likelihood, the risk score all risks has been assessed at less than 16. This means that at this point the risks need only to be monitored as they do not provide a real threat to the achievement of the objectives of this report.

Recommendations

13. The Board is asked to respond to the issues and provide comments/input that can be incorporated within the sub-regional process.

Reason: to assist in meeting Council and LSP objectives.

Contact Details

Author:

Roger Ranson
Assistant Director Economic
Development
Phone No: 01904 554420

Chief Officer Responsible for the report:

Bill Woolley
Director of City Strategy

Report Approved



Date 27 Feb. 07

Specialist Implications Officers: None

Wards Affected: *List wards or tick box to indicate all*

All



For further information please contact the author of the report

Background Papers: Held in file ECON15A at the Economic Development Unit

Annexes - Annex A – Current SRIP funded projects
Annex B – York and North Yorkshire Partnership Unit – Investment Plan
review: transformational themes

Current SRIP funded projects

Project Name	Brief Description	Start Date	End date	YF funding	CYC funding	Other funding	Projected outcomes
York City Centre Partnership (Business Improvement District)	Partnership established to address the need for a collaborative approach between the public and private sectors to improve the competitiveness of York City Centre, create a cleaner, safer city centre environment and engage stakeholders in a Business Improvement District Strategy and vote.	according to contract - 1 April 2005 actual start date - 3 October 2005	September 2008	£250,000	£79,000	£30,000 Land Securities - £18,500 M&S - £20,000 York Business Pride (in kind only)	Projects delivered as set out in YCCP action plan Viability of BID determined and vote in place
York - Area Tourism Partnership	Combination of resources for establishing a new single tourism organisation in the city, and investment in marketing, market research and product development activity which will help York deliver a 5% per annum growth in tourism earnings	April 1 2006	31 March 2010	£666,700	£436,000 - cash plus overheads	Bureau: £1,160,000, Hospitality Association £1000,000	5% per annum growth in tourism earnings, 1% per annum increase in visitor satisfaction, 0.76% annual growth in employment etc.

<p>Nurturing Creative, Science and Technology Businesses – York and North Yorkshire</p>	<p>Provide mentoring to York's high technology community & help to generate new businesses in N. Yorks. Create new employment opportunities in the high tech. Sectors. Guide education, training & skills needs to ensure the development of local workforce science & technology base. Raising awareness of science & technology opportunities & fostering international links & synergies.</p>	<p>March 2005</p>	<p>March 2009</p>	<p>£2,295,000</p>	<p>£1,175,000</p>	<p>265,000 in-kind investment from the University £760,000 private investment</p>	<p>Overall 57 businesses created 180 businesses assisted 805 jobs created 370 Learning Opportunities</p>
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ANNEX B

YORK AND NORTH YORKSHIRE

INVESTMENT PLAN REVIEW 2007

TRANSFORMATIONAL THEMES

This is the next iteration of the paper incorporating amendments and revisions proposed since 18.01 .

The intro, vision and appendix all need rewriting,

**York and North Yorkshire Partnership
Unit
12 Clifton Moor Business Village
James Nicholson Link
Clifton Moor
York
YO30 4XG
Tel: 01904 477974
www.ynypu.org.uk**

18 January 2007

THE TRANSFORMATIONAL THEMES

Introduction

An important stage has been reached in the review of the Sub-Regional Investment Plan. A set of transformational themes that address the economic issues within York and North Yorkshire, providing the framework for Plan, has been prepared.

These themes are derived from Strategic Economic Assessment. Work on the Assessment benefited from a broadly based discussion with partners, starting with a 'First Thoughts' paper and workshop in May. This was followed by a further series of workshops, led by consultants EKOS, enabling them to complete the Assessment in October 2006. That concluded the first stage of the review.

The Next Steps

We are now in the second stage of preparing the Investment Plan - the identification of issues and priorities. This will be completed by March 2007. The final stage of the plan - seeking solutions to issues - will be completed by June 2007.

The first part of this second stage involved a reflection on the evidence in the Strategic Economic Assessment to determine what sort of aspirations we wish to achieve through the Investment Plan. Over the next few years, public sector resources to support economic development will be reduced and it is important that we focus on what might be the most important priorities.

Therefore the Development Board, supported by the Partnership Executive, have agreed a framework for the Plan review based on a set of five transformational themes. The geography of York and North Yorkshire is diverse and therefore four spatial foci have been identified to ensure the applicability of these five themes to local areas.

It is intended that towards the end of March, "issue specifications" will be published commencing the final stage of the Plan review which seeks solutions to enable the sub region to achieve its objectives. Prior to this the wider engagement of partners in the five transformational themes is sought so that the final stages of the plan truly matches the aspirations of as many people as possible.

The Request for Partner input

Partners are specifically asked to consider whether:

- a) They feel they can engage with, and support, the aspirations of the plan as expressed through the five transformational themes and the suggested interventions.
- b) And to consider what might be the most important issues for them.

So that views can be fully considered in the preparation of the "issues specifications", a response from partners is sought by the 15th February, 2007. Ideally an earlier response than that would be greatly appreciated. These should be returned to the York and North Yorkshire Partnership Unit.

This document should be printed in colour. If printed copies are required then these can be made available by contacting susan.christie@ynypu.org.uk (01904 477970)

Contents of this Document

The Vision	page 2
Transformational Themes	page 3
Spatial Context	page 9
Appendix: Investment Plan Review Process	page 14

THE VISION

The starting point is to agree a vision for the sub-region – high-level value(s) that encapsulate our overarching ambition. This means:

- constructing a 15 – 20 year vision if we are really to change the culture and transform the economic base.
- ensuring that we will achieve the goals of sustainable development in those changes.
- recognising the need for aspiration that is stretching but realistic. Also, the competition is huge –we need to differentiate ourselves from the very many other sub-regions that would make similar claims
- getting ‘buy in’ – such a vision can deliver impact that is greater than the sum of its parts
- whilst being selective, seeking an ambition that is meaningful across the sub-region and is therefore applicable or replicable across local economies and communities
- the need for focus – fewer and bigger interventions are likely to have most lasting impact

The vision is still being developed. However, though the words need refining, a series of discussions with key stakeholders has revealed a remarkable degree of consensus – a set of key values that reflect our strengths but also the need to address change.



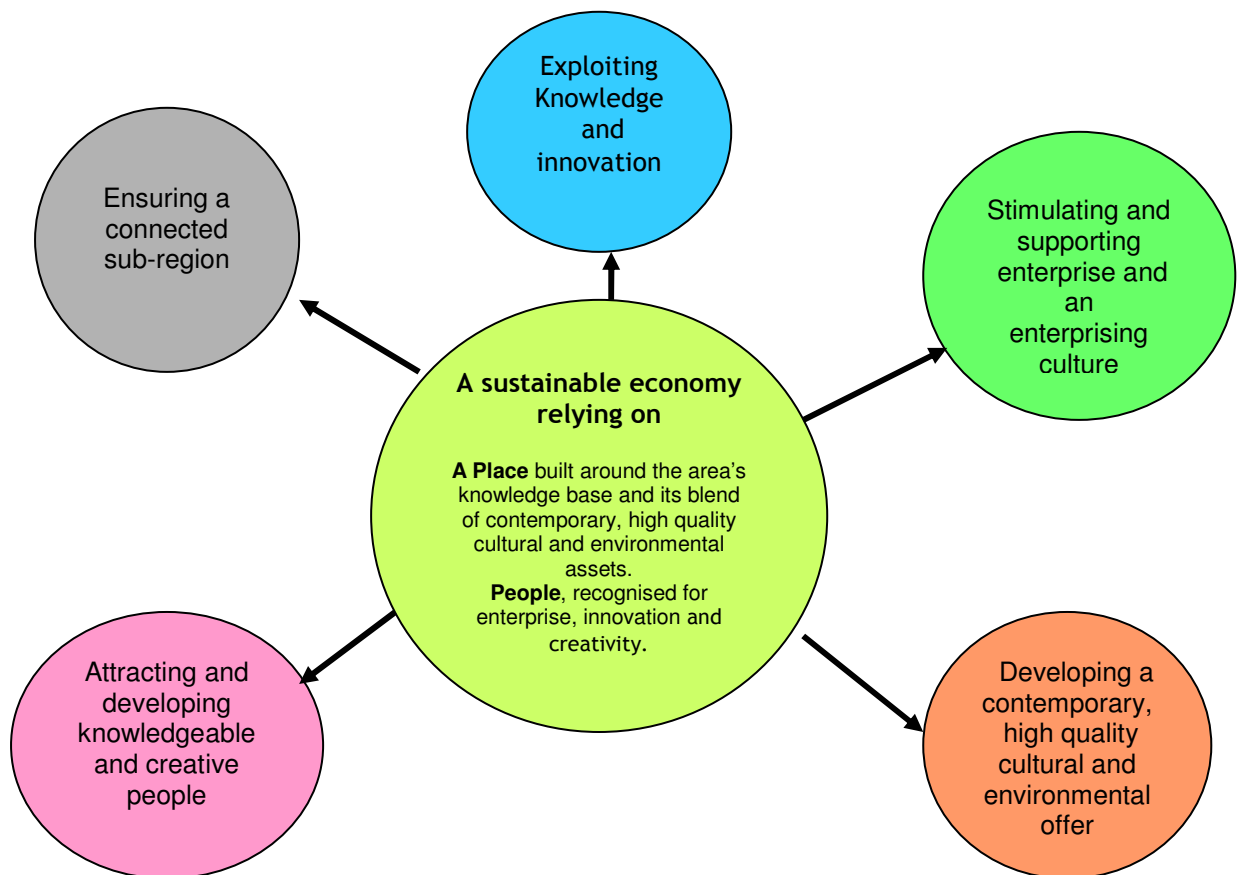
TRANSFORMATIONAL THEMES

The themes translate the vision into five key ‘platforms’ to take the Plan forward. They reflect the evidence in the Strategic Economic Assessment and the opportunities that are available to the sub-region.

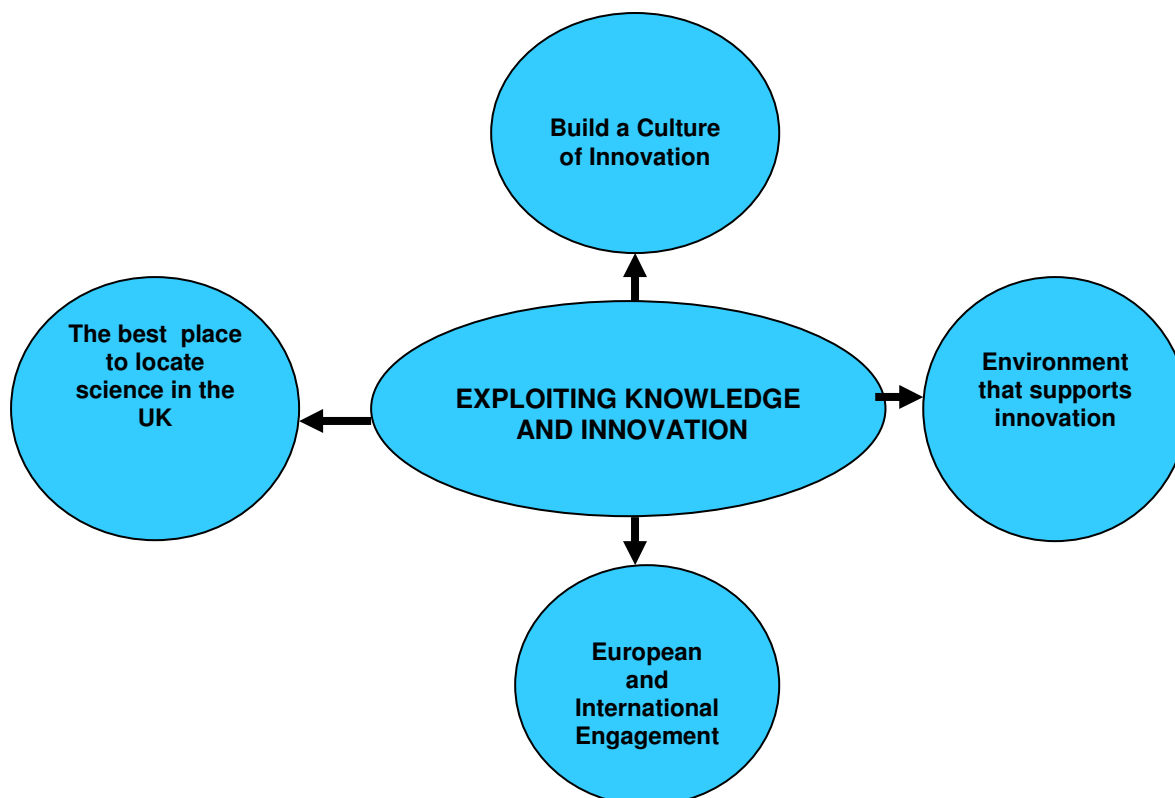
They also take account of some imperatives:

- building on opportunities and potential for success (and then spilling out that success)
- accepting that not everyone can benefit equally from each aspect of the priorities
- the greater and more lasting impact of having fewer, bigger and stronger interventions which are not simply a proliferation of initiatives
- focus on ‘opportunity’ rather than ‘need’
- stimulating facilitating cultural and attitudinal change – in a way that is applicable across sectors and across areas

On this basis, it is suggested that there should be **five main transformational themes** in the new Investment Plan.

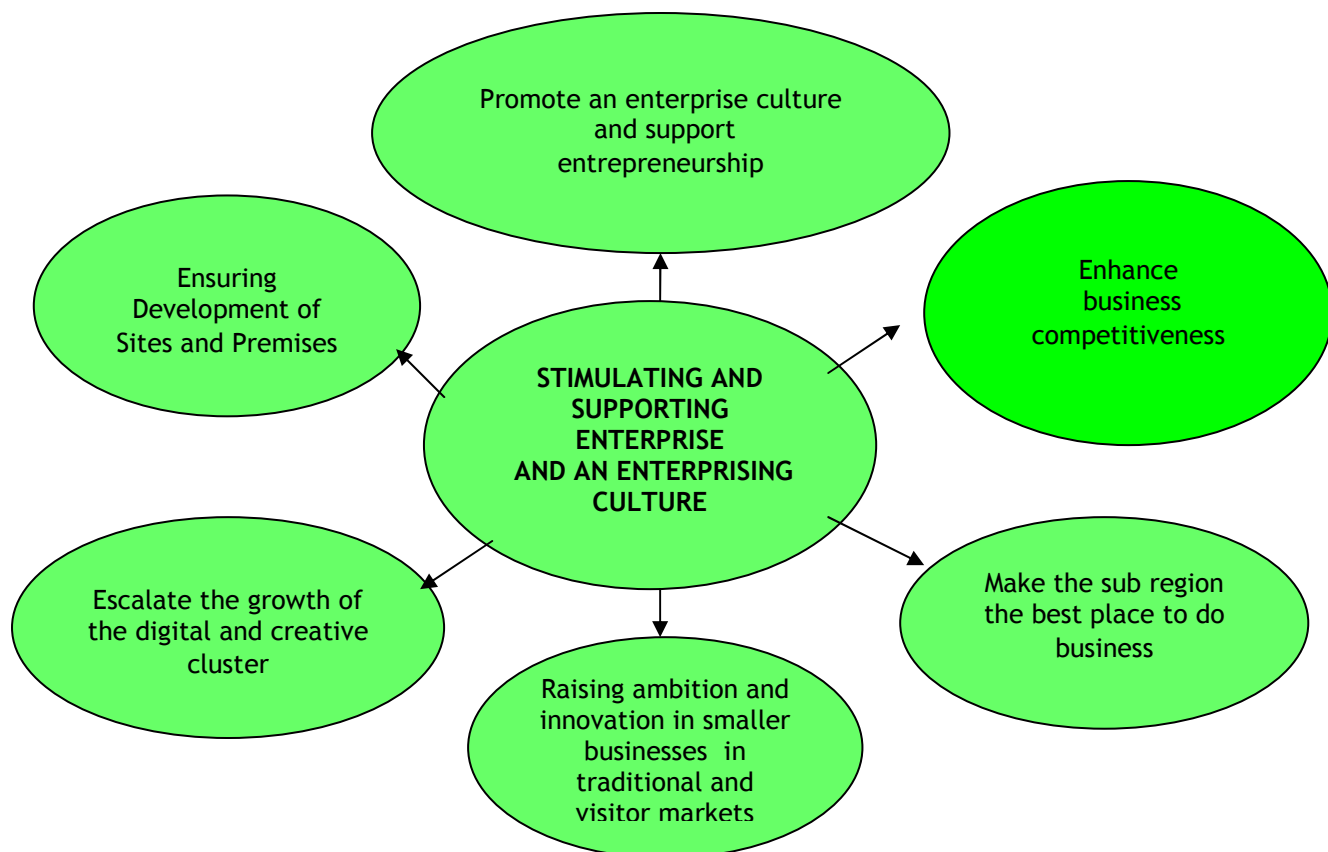


The next five pages provide the detail of the proposed interventions that will define the themes and provide the basis for future action.



We want to:-

- **Build a culture of innovation** throughout the sub region, through the creation of new ideas, new products, processes, services and management systems, and connecting businesses into sources of innovation support. Innovation will also be a driver of the rural economy, developing Higher Education Institutional engagement and intellectual capital in rural parts. It will require effective linkage with 'skills' and 'enterprise' themes in order to develop the creative capacity and the supportive culture that turns knowledge into successful business
- **Create an environment that supports innovation**, where innovation can easily occur through concentrations of innovative companies alongside the strengths of the knowledge base. This means **building the knowledge base platform** – supporting university growth, especially where this leads to employment gain. It also means **extending the 'reach' of Science City York(SCY)** – increasing the depth and impact of SCY possibly through a more strategic vehicle that spreads SCY activity geographically (across North Yorkshire and towards Leeds City region) and develops new business activity and clusters. This could include the establishment of Innovation Hubs (e.g., the York Innovation Hub) and Satellites that would capitalise on existing science-related infrastructure, in particular at the Higher education Institutions, Central science laboratory and new, emerging knowledge opportunities. Independent manage workspaces will be turned into an integrated business incubator network.
- **Promote pan-European and international engagement.** Prioritise use of EU Structural Funds (2007-13) to help implement and deliver innovation in the region and forge strong collaborative networks, locally, nationally, internationally. Build stronger global links and presence, taking the region into new areas of trade.
- **Establish the sub-region as the best and easiest place to locate science in the UK** – evidenced through identifying appropriate funding streams (regional, national, EU and global), supportive public sector, availability of skills and excellence of the knowledge base and HEI expertise.



We want to:-

Promote an enterprise culture and support entrepreneurship – promoting enterprise to those in education or training and those living or working in the sub-region and supporting entrepreneurship in key groups - including high growth knowledge based businesses, spin-outs; social enterprises; young people, women, ethnic minorities, migrant labour , older entrepreneurs and those in disadvantaged communities

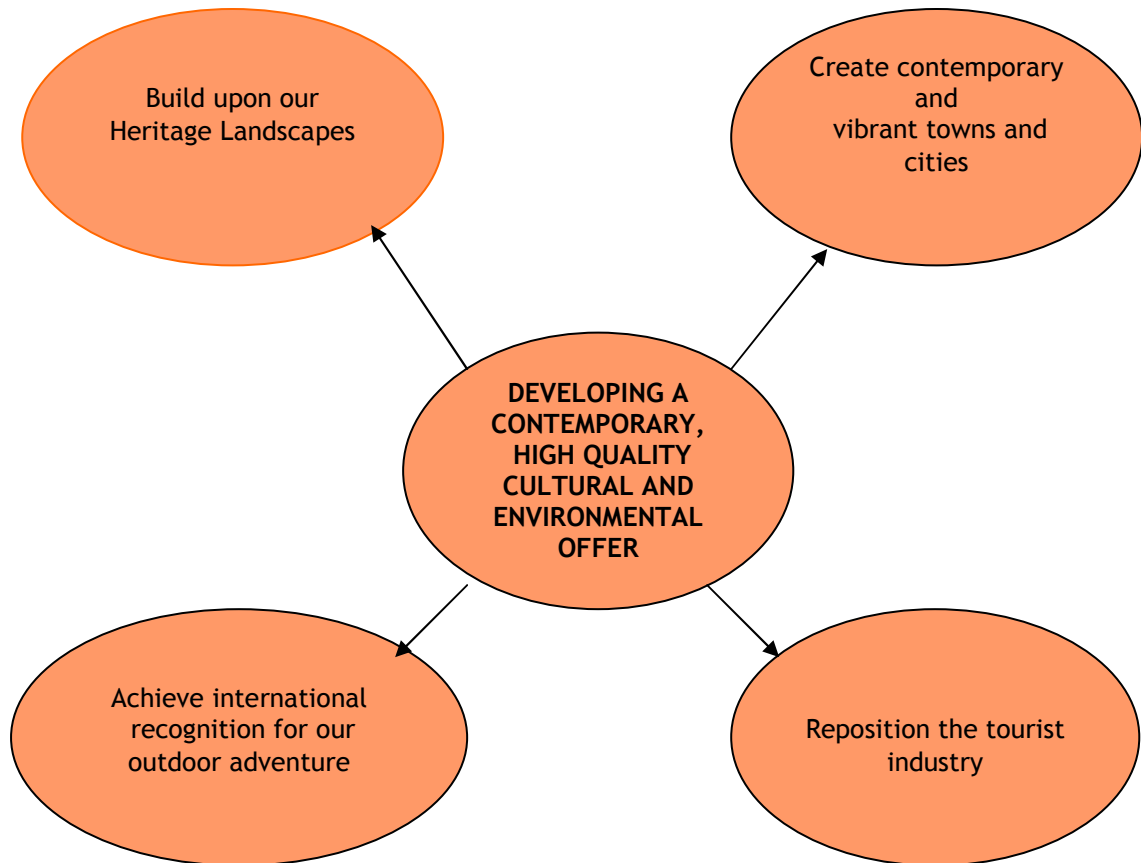
Enhance business competitiveness – support businesses maximise potential and exploit opportunities through the adoption of best business practices; e-business; management and leadership development; exploiting good environmental practise; innovative development of goods, services and business processes; internationalisation

Make York and North Yorkshire the best place to do businesses – creating the environment for business success by providing businesses with simple and timely access to relevant and effective skills, finance, networks and expertise and by providing simple and business-friendly support with issues such as planning, waste and energy management

Raising ambition and innovation in small businesses working in traditional industries or dependent on the visitor economy – increasing the aspirations and innovative approaches of those with the potential to operate in high value added niche markets whose development contributes to, or depends on, the image of the locality such as creative industries, tourism, cultural tourism, outdoor adventure, food and drink, festivals, events and land based businesses

Escalate the growth of the digital and creative cluster – maximising the growth of these sectors appropriate to varying spatial business opportunities.

Ensuring sites and premises to meet the needs of new, young and growing businesses – to ensure that supply of workspace meets demand – including incubation facilities and grow on space across the sub-region – to develop a diversity of modern provision.



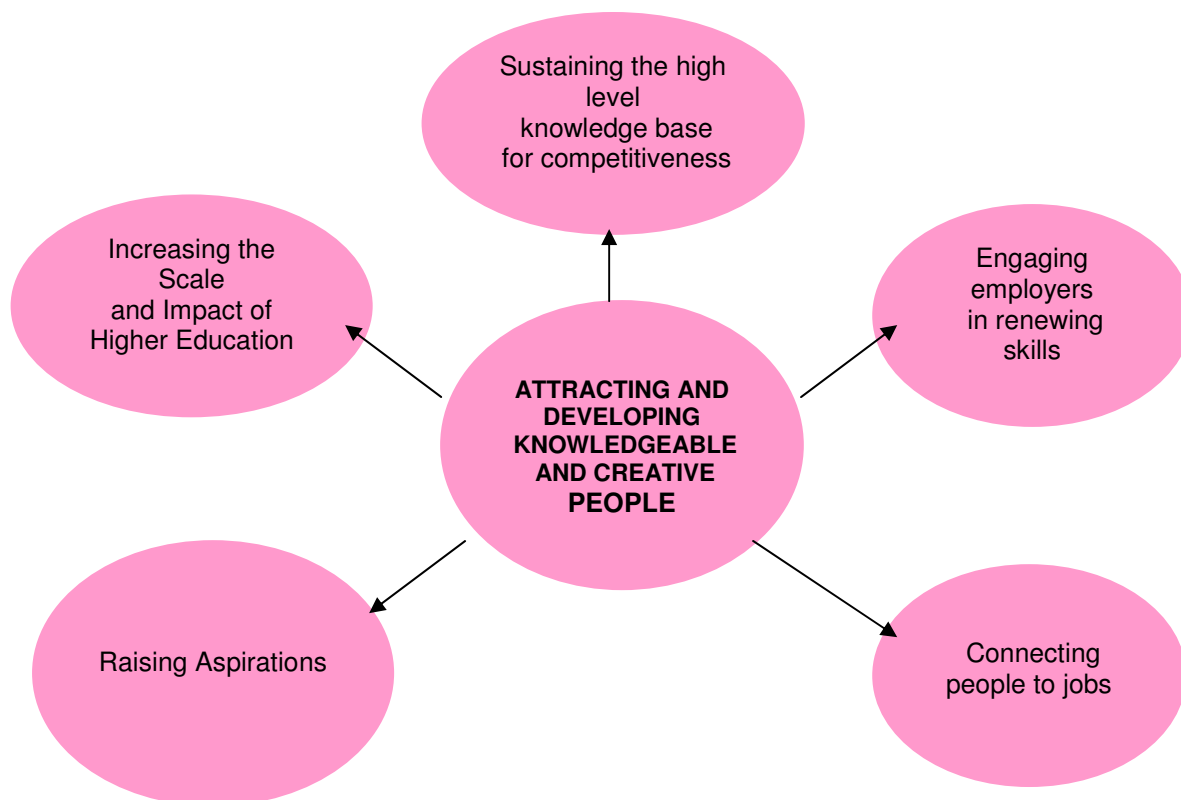
We want to:-

Create contemporary and vibrant towns and cities - investing in international quality townscape, building distinctiveness and sense of place by increasing the quality of cultural product including developing international standard cultural events and festivals, bringing existing visitor attractions up to world class standard, developing new cultural product that is experimental and creating cultural quarters where heritage and other cultural strands come together to create contemporary, vibrant environments.

Achieve international recognition for our outdoor adventure - creating an international profile by investing in the infrastructure especially for mountain biking and climbing.

Build upon our Heritage Landscapes - promoting clear brands around for example "Dinosaur Coast", Churches and Abbeys and our rivers and other concentrations of environmental assets, capitalising on investment in the natural environment to create new market opportunities, developing the creative industries as key economic drivers, reinterpreting our historic assets through a "state of the art" infrastructure, investing in leading edge interpretation that draws on the strengths of the sub-regional HE and digital industries sectors, and exploits our unique museum and archives collections to create international profile.

Reposition the tourist industry in a contemporary world - investing in the highest quality visitor information services, attracting the highest quality of visitor accommodation, supporting businesses in attractions, accommodation and food service to attract higher value added customers, enhancing and developing business tourism opportunities and raising the skills of workers in the visitor economy



We want to:-

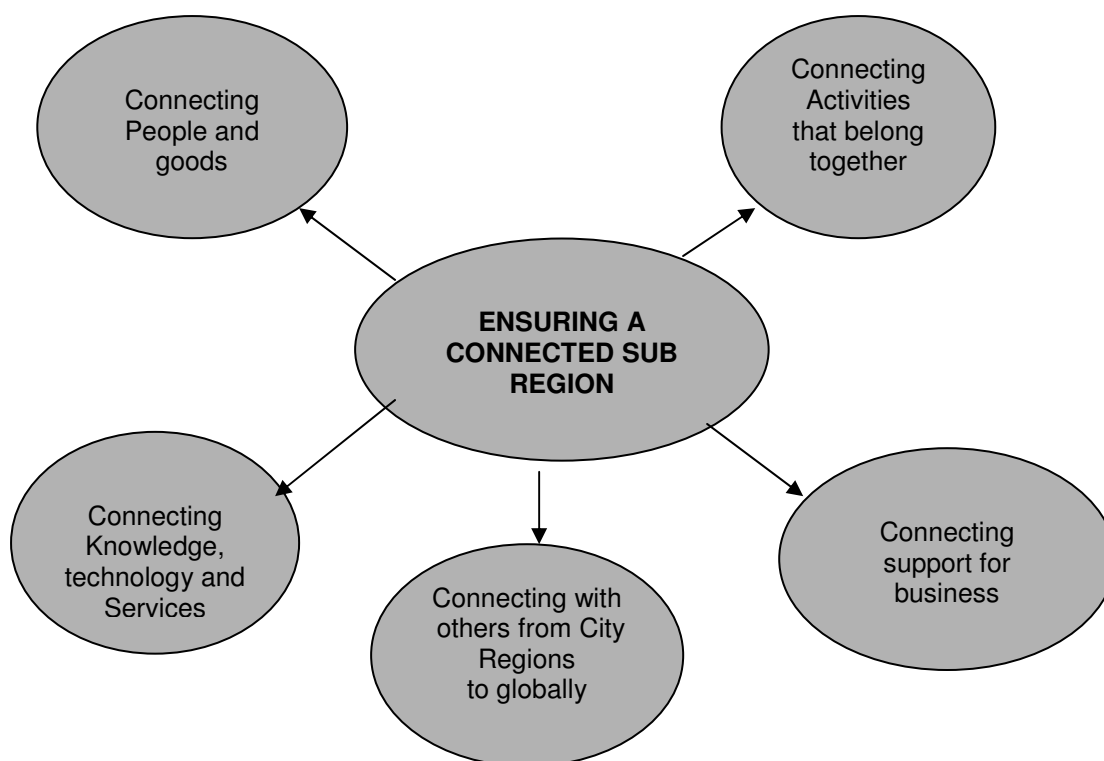
Raise aspirations— develop and prepare the current and future workforce to aspire to the career paths that are already available in the economy and will be available in future, and to fulfil individual potential within a transforming, inclusive and entrepreneurial society

Increase the scale and impact of Higher Education – placing the expansion and diversification of higher education as central to increasing economic activity, as an economic driver promoting knowledge transfer and broadening cultural life

Sustain the high level knowledge base for competitiveness – ensuring that those people with high level skills and qualifications remain competitive in the job market as well as enabling all people to progress to those levels of attainment, by means of a high quality learning infrastructure providing excellent high quality learning opportunities

Engage employers in renewing skills – working with all employers, to develop an inclusive and diverse workforce which is flexible and has appropriate skills relevant to the changing employment and economic structure. Additionally to ensure that businesses can access leadership and management skills

Connect people to jobs – address problems of worklessness and focus on those people who are disadvantaged by having low levels of skills or qualifications, whether they are in employment or not



We want to:-

Connecting Knowledge, Technology & Services – ensuring easy access to knowledge and services, especially through durable broadband provision. Encouraging increased use of virtual networks to promote trade, learning and the delivery of public and private services in ways that maximise the inclusion of rural communities and builds sustainable economies.

Connecting People and Goods – ensuring effective, efficient and sustainable transport networks especially improving access to peripheral areas. Connecting the sub-region to regional and other airports in ways that are effective and efficient.

Connect Activities that belong together – Joining up strategies and plans and actions to ensure an integrated approach to investment

Connect support for business including skills, premises, enterprise into a unified delivery package including enabling business support and learning to be accessed readily in remoter locations, smaller towns and deprived areas

Connect with others from City Regions to globally – developing political, functional and physical connections to implement City Region Development Plans for the economy and labour markets and improving public transport. Developing European and global relationships relevant to the future economy.

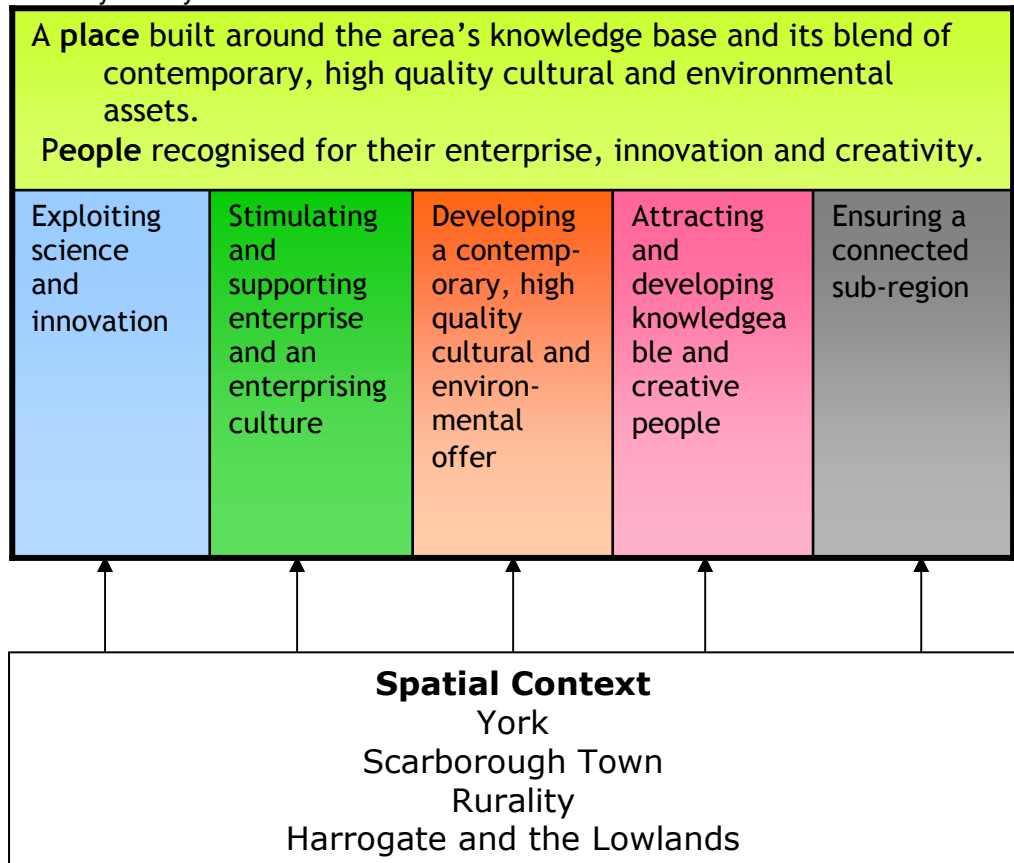
SPATIAL CONTEXT

The five Transformational Themes have been identified that reflect evidence in the Strategic Economic Assessment. Within the context of those Transformation Themes, four spatial areas were identified as having specific characteristics which may need to be addressed, through the themes, in a more targeted way.

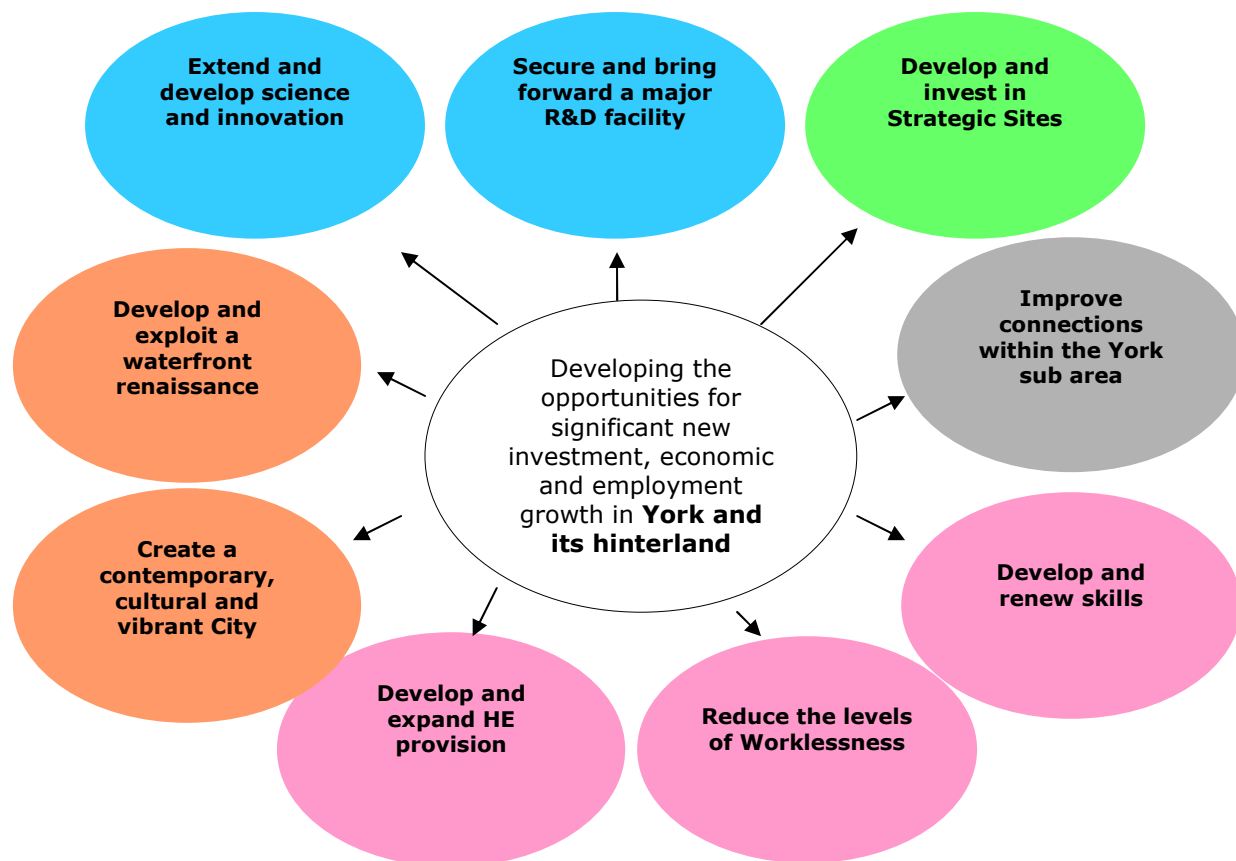
These spatial foci were defined as follows:-

- Developing the opportunities for significant new investment, economic and employment growth in York and its hinterland;
- Significantly raising the economic performance in Scarborough town
- Addressing the problems of rurality through building a sustainable economy
- Sustaining buoyant economies integral to the City Regions of Leeds and the Tees Valley (the short hand title for this being Harrogate and the Lowlands)

In setting out the specific or unique interventions within each of these spatial foci it is essential that they clearly reflect and contribute to the Transformational Themes.



The following sets out those interventions that are unique or specific to the spatial foci. These are colour coded to reflect there connection to the Transformational Themes.



TO BE AMENDED

- **Infrastructure for Science** – Incorporating the expansion of the University of York, developments at Burn Airfield and any other investments that are supporting the development of science (but not science companies) infrastructure.
- **The York Innovation Hub** – To look specifically at proposals in the Regional Innovation Strategy to enhance innovation hubs in the region to see how Sciences City York and its development might incorporate that role.
- **Strategic Sites and Premises** - identifying a site and premises strategy based on an assessment of demand. It doesn't include the City Centre but it is seeking to encapsulate renaissance activity in Malton and Selby.
- **Worklessness and skills** - This is clearly looking at the localised problems of worklessness and high concentrations of benefit claimants but also needs to take account the role of basic skills, particularly in some areas of Selby in addressing this problem.
- **Culture and Tourism** – This seeks to draw together proposals for a contemporary cultural and vibrant city, developing the tourism product and city centre developments, including retail. This is about building a sense of place within the city.
- **Connectivity** - To consider the issues of transport and other connections in the context of the Leeds City Region plan, ICT Connectivity and also the implications for the fluidity of the labour market.
- **Selby town**

OLD VERSION

To develop the opportunities for significant new investment, economic and employment growth in **York and its hinterland**, we want to specifically:-

Extend and develop Science and Innovation – increasing the depth and impact of science City York and developing a proposed York innovation hub

Secure and bring forward a major R&D facility – work with partners on locating a major Research and development facility at Burn Airfield.

Develop and Invest in Strategic sites – to meet the need for new, young and growing businesses, offering incubation facilities, grow on space and specialist workspace. In particular, within York and the market towns of Selby and Malton.

Develop and Expand HE Provision – Placing the expansion of the University, and other HE provision central to increasing and developing economic activity in and around the City.

Reduce the levels of worklessness - Connecting people from disadvantaged communities in York to good jobs, addressing the problems of worklessness and skills.

Develop and renew skills – appropriate to the changing economic and employment structure of York.

Improve connections within the York sub Area – ensuring that York acts as an economic driver for the surrounding area and neighbouring towns such as Selby and Malton.

Develop and Exploit a Waterfront renaissance – utilise the rivers to develop and promote an exciting, vibrant, cultural environment, connecting York to its surrounding towns.

Create a contemporary, cultural and vibrant City – investing in its internationally recognised heritage, townscape and culture, and raising the quality of the tourism offer.



To significantly raise the economic performance in **Scarborough Town**, we want to specifically:

Encourage and develop the creative and digital Sector - Stimulate the new growth sectors building on the investment in the new Creative Industries Centre, the work of the Creative Driver Partnership, and the School of Arts, New Media and Digital at the University of Hull.

Increase the availability of sites and premises - Develop an investment strategy to support a diversified and modern economy through the provision of a property ladder to support start up businesses, provide grow on space for existing businesses, and to meet the needs of the Borough's inward investment activities.

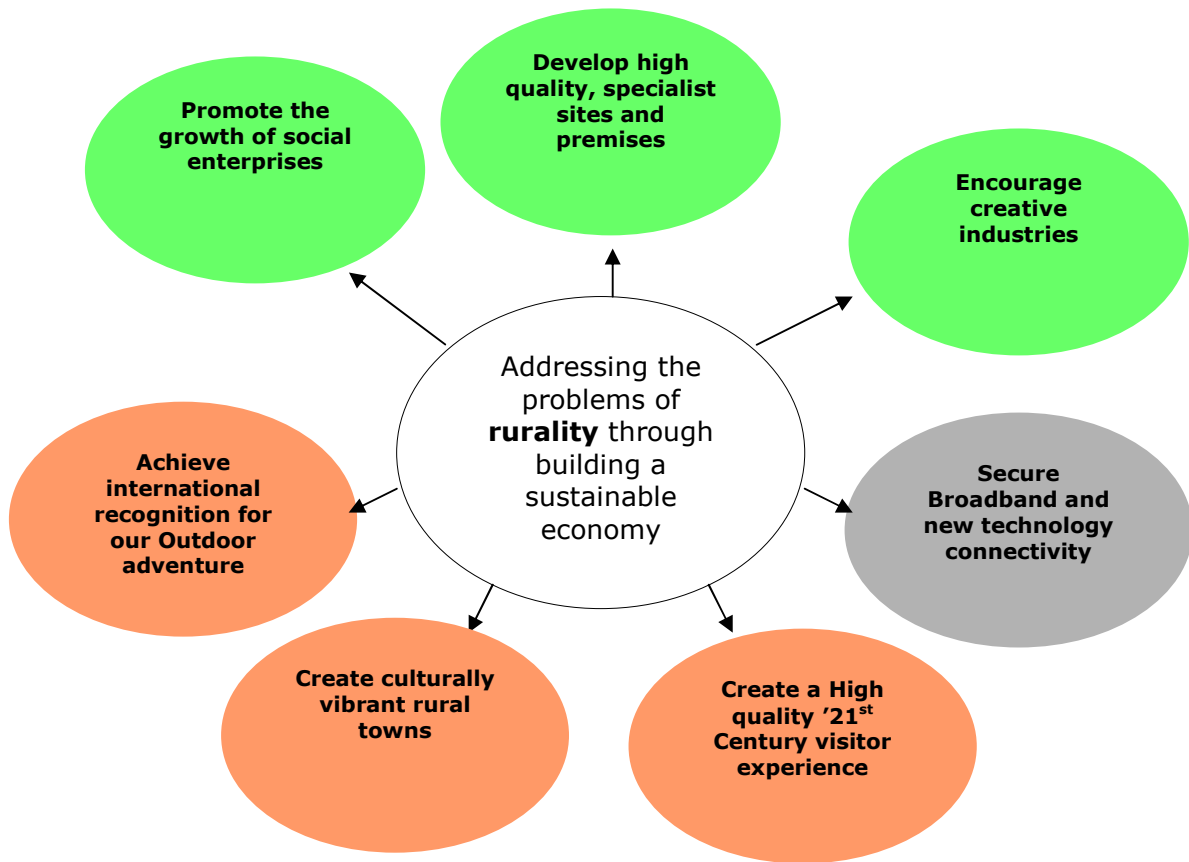
Promote and develop entrepreneurship - In order to address low start up and survival rates, develop enhanced and targeted programmes of support and encourage social enterprise, particularly in disadvantaged communities.

Improve connectivity to Scarborough - In order to support better economic performance in the city region, improve connectivity, including road and rail, but with a specific focus on information and communication technologies (next generation broadband and wi-fi).

Reduce worklessness and improve skills - Reduce the levels of worklessness and benefit dependency through investment in local learning centres, provision of skills for life learning opportunities, and "supported recruitment" to connect people in disadvantaged communities to new employment opportunities in the town.

Develop and expand learning opportunities - Develop Scarborough as a "Centre for Learning" through the expansion of HE provision and the redevelopment of Yorkshire Coast College to support increased economic activity and the broadening cultural offer.

Develop and create a contemporary and vibrant Scarborough - Building on the continuing Renaissance of the town, improve the quality of place, improve the quality of the tourism product and develop further the towns cultural offer in order to attract and develop creative people.



To address the problems of **rurality** through building a sustainable economy, we want to specifically:-

Develop high quality, specialist sites and premises – investing in starter units and grow on space within the rural settlements, and encouraging the use of rural buildings in offering high quality/ high spec. units aimed at attracting higher value added businesses and jobs to the remoter rural areas.

Secure Broadband and new technology connectivity – ensuring that the remoter rural areas are on a par with the provision available elsewhere.

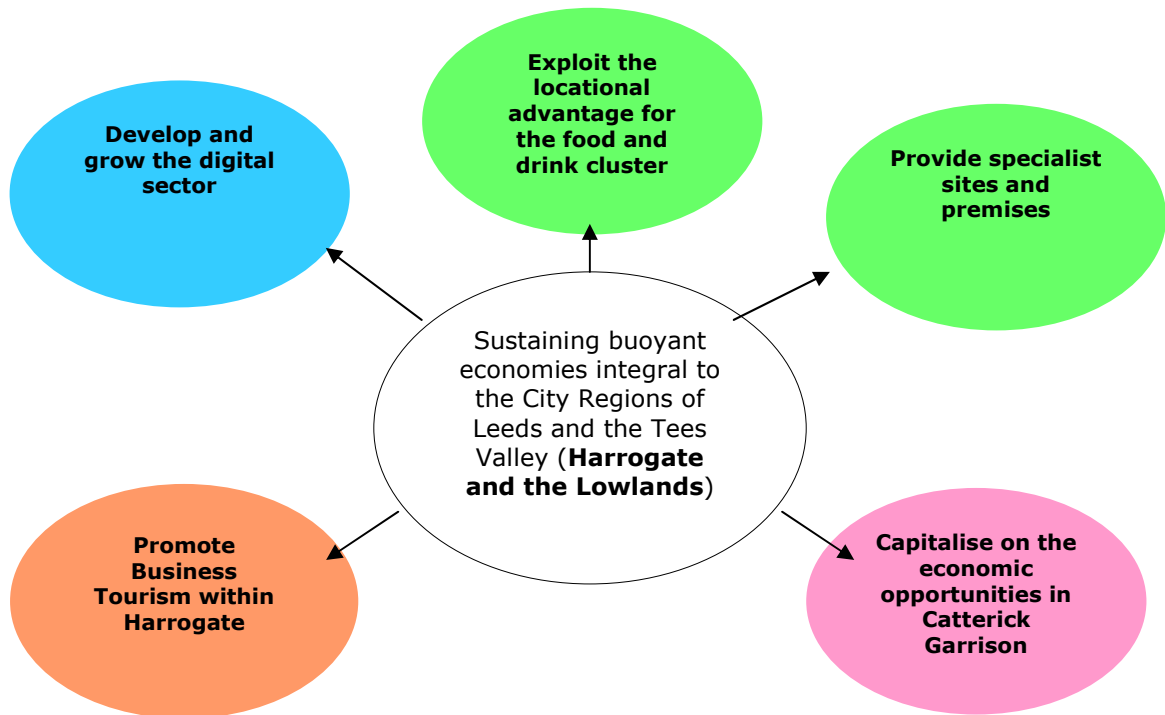
Achieve international recognition for our outdoor adventure – creating an international profile by investing in the infrastructure and promoting our outdoor adventure.

Create culturally vibrant rural towns – For towns adjacent to high landscape value e.g. The National Parks, with high quality heritage and townscape. Improving the quality of the tourism and cultural offer, through ensuring that rural towns contribute to and add value to the visitor economy.

Encourage the growth of creative industries – Develop and build the infrastructure to promote the creative sector as a means of growing the remoter rural economy, and add value to the sub regions visitor economy.

Promote the growth of social enterprises – In particular developing the potential of social enterprises in not only addressing rural issues of accessibility, isolation and provision of local services, but also in providing entrepreneurship, employment and skills.

Create a high quality '21st Century' visitor experience from our heritage landscape – Increasing the economic value from our special high quality heritage landscape, through state of the art infrastructure. Also improving and developing skills in heritage and traditional skills.



To sustain buoyant economies integral to the City Region of Leeds and the Tees Valley (**Harrogate and the Lowlands**), we want to specifically:-

Develop and grow the digital sector – Support, develop and grow the digital sector, exploiting the range of markets opportunities.

Provide specialist sites and premises - for business incubation , grow on space and linking to City Regions sectors and clusters.

Exploit the locational advantage for the food and drink cluster – Build on current investment, promote and grow the sector, increase R&D linkages, connections to the upland areas and make NY the food and drink capital.

Promote Business Tourism in Harrogate – Build on the existing infrastructure and develop and invest further in ensure that Harrogate has a modern and competitive business tourism offer.

Capitalise on the economic opportunities arising through the investment in Catterick Garrison – develop a broad range of employment and business opportunities both off and on base, ensuring that the skills of the current and future population enable them to connect to good jobs.

APPENDIX ; INVESTMENT PLAN REVIEW PROCESS

The Sub Regional Investment Plans are the tool for delivering the Regional Economic Strategy (RES). Following the development of the first Strategic Economic Assessment (SEA) in each sub-region at the end of 2003, the first Sub Regional Investment Plans were published in July 2004.

Yorkshire Forward has established a cycle whereby the Investment Plan is reviewed in the year following the 3 year review of the RES. The RES was last reviewed in 2005 and submitted to Government in October 2005. A final version was produced in May 2006.

There will therefore be a review of the Sub-Regional Investment Plan and this will be completed by June 2007. The first stage of preparing a new Strategic Economic Assessment was completed in October 2006.

The SEA enables the sub-region to identify a series of needs and opportunities against the RES objectives and provide an evidence base on which to identify activity over the long, medium and short term in the Plan.

What does the Plan seek to do?

Sub Regional Investment Plans articulate what strategic activity the sub-regions will undertake to:

- ensure that positive economic benefit continues in order to deliver the objectives and targets outlined in the RES
- counteract underperformance
- capitalise on potential opportunities
- capture all partners activities with the specific aim of promoting a joined up approach to public sector investment

The Plan is a strategic view on what needs to be done, how it is going to be achieved and how the sub-region will measure and evaluate the effectiveness of its interventions. It will also be an influencing and aspirational document, making the case to a range of public and private sector partners to support both short, medium and long term activity to engender a change for the region's people, businesses and places.

How far ahead will the Plan look?

The Plan produced in 2007 will be different from the first plans produced in 2004. They only looked forward five years and concluded with a detailed list of projects showing where the resources notionally allocated to an area would be utilised.

The new Plan will look further ahead, around ten years but this is not prescriptive. It will concentrate on identifying what it aspires to in terms of impact on the economy and in that context what might be the prioritised short and medium term outcomes. The Plan is outcome led and they provide the rationale as to how resources will be utilised.

Will the Plan contain a list of Projects?

Although it will not conclude with a list of projects, the Plan will identify the activities that will address the interventions and issues that will enable the plan to achieve the desired impact. These activities will be developed with funders and the Plan will show how resources will be prioritised towards them.

After the Plan is finished a more detailed delivery plan will be drawn up. The format of this has yet to be designed but it is expected that it would cover the first next three years and set out what projects will be developed to take forward the activities.

How will it be prepared?

The Investment Planning process requires the Sub Regional Partnerships to take the issues identified within the Strategic Economic Assessments through to a strategy for change. This requires a structured process to ensure that:

- the identified issues are clearly described and have achievable targets against them for change
- any activity undertaken in addressing the issues is monitored and evaluated for success or failure
- there is clear decision making and accountability for all areas of the Investment Plan process in each sub-region
- that Investment Plans expand the range of investors who contribute to achieving the aims of each plan

What is the timetable?

Three stages have been identified for this review of the SRIP. These are

1. Completion of the Strategic Economic Assessment (done)
2. Identification of issues and priorities by March 2007
3. Seeking solutions to issues and drafting of Plan by June 2007

What are the next stages?

2. Identification of issues and priorities

Stage 2 of the Investment Planning Review is about the identification of issues, priorities and setting up of activity to address them.

The Development Board in December 2006 agreed five transformational themes and interventions which will provide the framework for the plan. Within that context four spatial foci have been developed and approved by the Partnership Executive in January. Leads from the Executive have been identified for the themes and spatial foci, and they are working with priority groups to take forward the work.

Activity in January and February includes a process of wider dissemination of the themes and the seeking of partner engagement.

This stage will conclude with the drawing up of a series of issue specifications. These will describe the issue, set out change required (outcomes) and place that in a policy and funding context. The specifications will be used to draw up a remit for the priority groups to take forward the themes and the agreed interventions.

This work will be reviewed by the Development Board in March 2007.

3. Seeking solutions to issues and drafting of Plan

The priority groups will therefore be tasked to seek solutions to address the issue specifications. Initial activity will include:

- Ideas generation and scenario building: seeking solutions in addressing the issues identified
- Influencing and negotiation: with partners, the Partnership Executive and potential investors
- establishing performance management activity: tracking, monitoring and the evaluation of activity
- establishing reporting mechanisms: both within the partnership and to the wider public

During the same period background drafting of the Plan will commence, which will then be merged with the work of the priority groups, leading to agreement and sign off the Sub Regional Investment Plan by the Development Board in June.

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Economic Development Partnership Board

13th March 2007

Report of the Director of City Strategy

PROGRESS ON KEY ISSUES

Summary

1. The report picks up on any matters arising from the last meeting of the Board and briefs Board members on issues/progress in other areas of economic development activity.

Background

2. This is the progress on key issues report which is given at every Economic Development Partnership Board to update members on projects and to answer any matters arising from the previous meeting.

Consultation

3. The report is being provided for information and there are no recommendations with financial consequences. There is no consultation necessary for this report.

Options

4. This report is for information only and therefore does not present options for decisions by Board members. Where decisions are necessary specific reports on those issues and options will be presented. However, Board members are invited to comment on the information provided.

Analysis

5. As stated in the paragraph above, options have not been presented therefore there is no need for appraisals.

Corporate Priorities

6. All the projects reported on in this report are firmly embedded within the Council's corporate objectives, The Economic Development Service Plan and the Without Walls initiatives.

- * The "Thriving City" theme of the WOW Community Plan has the following strategic objective:

"To support the progress and success of York's existing businesses and to encourage new enterprises in order to maintain a prosperous and flourishing economy that will sustain high employment rates."

- * The Economic Development Service Plan sets identifies a number of corporate priorities:
- DIP 5 Increase people's skills and knowledge to improve future employment prospects.
 - DIP 6 Improve the contribution that Science City York makes to economic prosperity.
 - DIP 8 Improve the life chances of the most disadvantaged and disaffected children, young people and families in the city.
 - DIP12 Improve the way the Council and its partners work together to deliver better services for the people who live in York.

Implications

7. As this is a general report on the progress of key issues there are no Financial, HR, Equalities, Legal, Crime and Disorder, IT, Property or Other implications. Any significant implications to the economic programme will be brought to the Board through a separate issue-specific report.

Matters Arising

8. There are no matters arising.

Tourism

9. The final draft of the Area Tourism Strategy for York is featured elsewhere on this agenda. A Task and Finish Group, including representation from City of York Council, York Tourism Bureau, York Hospitality Association, Yorkshire Forward and Yorkshire Tourist Board has been meeting to discuss closer working arrangements between the current First Stop York tourism partners, with a view to establishing a potential single organisation for tourism in York, possibly by April 2008. This new body will seek to build on the achievements of the First Stop York tourism partnership in such areas as marketing and promotion, development of the quality of the product, improved market intelligence, better visitor information service provision etc – whilst at the same time safeguarding and ultimately growing the scale of private and public sector investment in tourism activity. Establishing a new and improved organisation requires discussion of issues concerning governance, staffing and structures, funding and outputs, operational relationships and communications of activities to the tourism sector in York. Progress is being made on a number of these issues.
10. In the meantime the current partnership continues to develop new and improved activities, with additional support from Yorkshire Forward, which has pledged £666,700 of support to the Partnership for a combination of organisational and structural change, and enhanced investment in marketing, market research and product development activity. This investment (of which £221.7K has been available in 2006-07) has supported such activity as:
- The Illuminating York project, promoting a series of events particularly in December and January to use light and innovation to give a contemporary

spin to York's historic urban environment. The showpiece Recovered Light projection in College Green, projecting features of 117 stained glass panels hidden under the scaffolding of the Minster attracted national press coverage and visitors from all parts of the UK in York's traditionally quietest month, while the LUX trail of artworks in Micklegate, created by graduates and students of St John's University, helped to animate this street, and was well-received by the retailers who showcased this work in their shop windows, and by the churches.

- Gourmet Yorkshire – a calendar and website which uses the connections from the showpiece York Festival of Food and Drink to highlight to visitors York's gateway role to many food and drink facilities and services in the North Yorkshire and Yorkshire region.
- Market Research – many additional market research projects have been established, looking at benchmarking (comparing York's tourism offer and services with those of other historic towns in England – including Bath, Chester, Salisbury, Durham, Oxford, Stratford-upon-Avon and Windsor), conference research, the Festival of Food and Drink and evening economy research – all designed to ensure that future marketing and events campaigns in the key target markets are based around the best possible knowledge of potential consumer response. The results of this research are very encouraging - York is really popular and well-regarded by visitors. Current visitors are loyal (76% of them have been to York before), and very enthusiastic about York. The benchmarking research shows that a much higher proportion of York's visitors enjoy the city "very highly" (60%), compared to the average response across all historic towns (36%). The most positive responses have been those rating "very highly" the range of attractions (74%), nightlife (69%), shops (68%) and places to eat and drink (61%), as well as the usefulness of the Tourist Information Centres (63%) - in each case much higher scores than the average for historic towns. The only areas where trends have not been positive have been on the value for money of accommodation (36% cf the average score of 43%), and the cost of parking (5% cf 13%). The overall very positive feeling has clearly encouraged visitors to spend more time and money in York - there's been a 52% increase in visitor spending from 1993-2005
- The "history of York" – this is a website being developed by York Museums Trust linked to images and maps of the city through the ages, as well as a narrative history. This will ultimately present the most comprehensive on-line history of the city, with the option to build from this a visitor attraction of an AV presentation in one of the Trust's properties.
- The al fresco cinema in College Green last September, where nearly a thousand people enjoyed two films shown on the scaffolding of the East front restoration at the Minster, thereby bringing many more people into the city in the evening, and stimulating the evening economy.
- Enhanced marketing activity. This has included more conference marketing activity, including an enhanced presence at UK and European business shows, and a new PR campaign which is showcasing Cultural York – highlighting cultural events (music, lighting, film and art), visitor attractions and galleries which reflect York's vibrancy and high-quality appeal.

- The Leeds-Bradford Airport express coach service. After long discussions facilitated by City of York Council, First Group is starting, from 26 February, an hourly express coach to and from York railway station and Leeds-Bradford international Airport. The service, yorkaircoach.com, runs from York from 0445 with the last service from the airport to York at 2400. The Yorkshire Forward support is being used on foreign language translations of key sections of the main tourism print material and website to help attract foreign visitors to York. With a substantial increase in the number of scheduled services and destinations supported by Leeds Bradford Airport, the widening of Jet2's operations from there and on-flight survey information showing that 35-40% of passengers on key European flights are European customers (rather than purely UK customers going back and forth), there is great potential for York in attracting more European visitors.
11. Core activity through the partnership continues. This work has included, since the last Economic Development Partnership Board, a number of York's most popular annual events.
- The York Festival of Food and Drink attracted at least an estimated 120,000 people to events over the nine days – these included markets, the Food Theatre in the Guildhall and events in the Mansion House and other locations, as well as dinners and wine tastings. The total economic impact of the visitors on York was estimated at £7.3m – not least because the majority of visitors (49%) were staying visitors, of whom 10% were staying for seven or more nights. Responses to the festival were extremely positive. The 2007 Festival is on 21-30 September
 - Over 100,000 people attended the St Nicholas' Fayre weekend on 22-25 November 2006, the great majority of whom were visitors. Special coach parking arrangements were implemented again to deal with the traffic management challenge.
 - The 2007 Residents First Weekend (27-28 January) featured more attractions than ever, with newcomers this year including the Norwich Union Yorkshire Wheel, DIG! and the Cold War bunker in Acomb. First Group and smilesallround estate agents were the sponsors. Responses from the attractions on their resident visitor numbers are being collated at present. One finding from the research indicates that over three-quarters of residents recommend attractions to visiting friends and relatives, or go with them to those attractions, when they stay with them. The "visiting friends and relatives" market is an important one, and York's tourism industry clearly benefits from this.
 - In Annex 3 are the latest tourism trends. Hotel occupancy trends have been disappointing this year (down a few percentage points each month compared to the same period last year), though this data, through the Tourism Board, is based on a sample of hotels so results may be affected by the sample size. In contrast the number of visits to attractions has generally been greater on a month-by-month basis in 2006 compared with 2005.

Future Prospects

12. The last six months has been a particularly busy time for the service. There has been an increase in enquiries from workers at risk of redundancy, not unexpected in the current climate. Negotiations have taken place with Nestlé and on-site consultants, DBM, and FP staff have been on-site since the 29th January. Discussions are taking place with the Learning and Skills Council (LSC) to explore ways of increasing resources and opportunities for workers at risk of redundancy in the city. Any opportunities and resources will be extended to other at risk workers (British Sugar and other smaller redundancies).
13. The contract with the LSC to offer learning and training opportunities to people with mental health problems is entering a final phase. It has been extremely successful and the LSC have extended the contract for a further 3 months with an increase in funding of £60,000. A recent audit revealed a 0% error rating.
14. In November FP received a matrix Excellence Award for outstanding services in information, advice and guidance. This is the second time FP have received this award (also in 2004) and FP is the only organisation in the UK to have received the award twice. The award was presented at a high profile event at the Institute of Directors in London by athlete Colin Jackson and Minister for Skills, Phil Hope.

The year-end performance indicators should be available in April.

Rail-related issues

North - South high speed link

15. An item on this was included in the Progress Report presented to the last meeting of the Board. Since then the comprehensive review of transport in Britain, commissioned by the Secretary of State for Transport and led by Sir Rod Eddington, has reported.
16. In summary, the Eddington Review concluded that the business case for a new high-speed line was not robust enough and although not burying the idea completely it has been dismissed for now with the emphasis being placed on more cost - effective investment in existing line capacity enhancement.
17. There continues to be some debate over the issue and although a preferred route was never selected, a disappointed Scottish Transport Minister for one has stated that a three hour London - Scotland rail service is needed for competitiveness, tourism and environmental reasons.

East Coast Main Line (ECML) re-franchising

18. Also reported to the last Board meeting were the increasingly difficult circumstances faced by GNER in operating their ECML franchise. The franchise was taken from them before Christmas and the company is now delivering ECML services on a contract basis agreed with the Department for Transport. This arrangement will continue whilst the franchise is re-tendered. The Department for Transport is expected to confirm the winning bid in July or August with the new franchise becoming operational sometime in the late autumn.

19. Expressions of Interest were invited from private operators over the Christmas period with a bidder short-list announced on the 20th February. These were Virgin, FirstGroup, National Express and Arriva.
20. With its parent company, Sea Containers, still in administration in the US, GNER won't be making a separate bid. However, the company managers are hoping that their management/operational experience combined with the company's reputation for customer-focused service will make it an attractive junior partner for one of the short-listed bidders. Negotiations continue in this respect.
21. In the meantime, as was the case during the earlier franchising process, a letter has been sent to the Department for Transport emphasising the importance of ECML to the York area economy. The letter highlights the need to provide quality rolling stock, station/integration improvements, capacity increases, value for money and better service quality and performance. It also picks out key issues such as facilitating the benefit the London Olympics can bring to the regions, developing York Central as a site with regional strategic capability and the need to extend the principle of "open access" competition for services.

The value of the existing York based headquarters function brings to the line as a whole has been highlighted.

22. Again, as before, it is envisaged that the short-listed bidders will be asked to make a presentation to the Board and others within the council with an interest when their intentions for the franchise (and the headquarters function) can be probed. If bidders are to take on-board the views expressed and incorporate them in their submissions, then presentations would be most beneficial in April/May.

Science City York

23. Since the last report in September Science City York (SCY) activity has focussed on the development of both its strategic and operational priorities in line with the Sub Regional Investment Plan (SRIP) from which SCY has received significant funding support. SCY was funded to create the new operational team structure which is now in place with the objective of optimising its delivery potential and to meet targets, outputs and outcomes agreed with Yorkshire Forward.
24. The new team members have concentrated on learning their new roles and developing the skills in managing cluster-based business interactions and focussed events. New committees have been formed or refreshed to support and advise staff. The existing Business Promoter team, now up to full strength, had focussed on delivering outputs in terms of business creation and funding support to new businesses through the Proof of Concept Fund (designed to assist test marketing ideas for products, services and new processes) and the Technology Growth Fund which takes business ideas on to the next stage of development.
25. Science City has undertaken publicity and promotional literature design in-house during the restructure and this tied to events management is beginning to show results and cost savings.

Staffing Structure

26. During September and October the final recruits joined the team covering the three key Cluster Executive roles in IT and Digital, Bioscience and Healthcare and Creative Industries. In October Paul Taylor joined SCY on a one year interim contract as the Project Director.

SCY Organisational Structure going forward

27. Following extensive debate between the key stakeholders of Science City York, the University of York and York City Council, a Stakeholder Board was established in mid-2006. This included representatives of the two main stakeholders, an independent Chair, the present Chair of SCY and key partners Yorkshire Forward. The formation of this Board recognised SCY's increasingly important regional as well as national role. Deliberations by the Board over the past months, backed by a study commissioned from SQW, led to the decision to create a new vehicle, a Company Limited by Guarantee (CLG) to formalise the partnership. A report to Council in September confirmed this decision.

Northern Way Bid

28. The Northern Way Bid was aimed at utilising funds set aside to create innovation assets in the Yorkshire Forward area. A bid valued at £2.6 million was submitted for a 'Hub and Spoke' model consisting of 3 innovation centre 'spokes' in key locations in York:-

- A Digital and Creative Technologies Centre c40,000 sq ft located on the Terry's chocolate works redevelopment
- Park Central c5000sq ft in- fill building between the Innovation Centre and the Bio Centre on the York Science Park creating additional offices, exhibition and networking space
- The creation of a Biological Business Centre located on the University campus

The bid progressed from Stage 2 to Stage 3 during October and November finally being approved to go to Contract Stage in late January 2007.

York Science Festival

29. Plans are well advanced for the York Science Festival in March. This event is now in its tenth year and Adam Hart Davis will be the festival patron attending events throughout the week. A special programme of events has been created by the Science City events team and these will take place across the city in a range of locations. This is a prime example of the public engagement and community involvement in understanding science and technology, a major role for SCY.

BA Festival 2007

30. The British Association for the Advancement of Science (BA) is a national foundation which promotes the public engagement and understanding of science. It was founded in York in the 1830s.
31. A four-day event will be held in York in September. Science City York will play a supporting role within the City Council to spread activity cross the city. This builds on the existing contacts and venues involved in the York Science Festival. The University already has an extensive programme of events and activities to engage adults and potentially 4,000 children from local schools.

It is also an excellent vehicle to promote the city as a global Science City and to work in partnership with the City's Tourism team.

32. Substantial amounts of sponsorship are still required and the city's tourism and leisure teams are working together with SCY to develop the programme with the BA, Yorkshire Forward and the University.

National Science Cities Development Group

33. York has been lead member of this group since its inception 3 years ago. A third Science City conference was held in Newcastle in early February and was attended by the new Minister for Science and Technology Malcolm Wicks (ex University of York)
34. This was a good platform for York to present a business case representing its work supporting a start up business in web-based training which exemplified SCY's joined-up approach.
35. There is much still to do in joining up the work of the individual cities into a unified approach mainly because each has a different model and speed of development. An area of activity that may well emerge as agreeable is in promoting the six Science Cities internationally, together with UKTI, as an investment and trade opportunity utilising a joint cluster approach.

STEM Commissioning Framework

36. The Science, Technology, Engineering and Maths (STEM) Board in Yorkshire, part of Yorkshire Forward, issued a call for projects and programmes of work covering 2006-2009 in the autumn of last year. Yorkshire Forward awarded SETPOINT a contract for family and adult lifelong learning and the promotion of science in January 2007. SCY will play a partner role in the delivery of this programme with providers building up the level of activity through additional support staff being drafted into the team to work in the areas of adult lifelong learning promotion.

York Training Centre

37. York Training Centre's main programmes are now Apprenticeship Training for 16-24 year olds and Work Related Programmes for 14-16 year olds. In addition, the Centre has recently secured a Learning + Skills Council contract (to 31 July 2007) to deliver E2E Level 1 apprenticeships to 16-19 year olds. The Centre also continues to deliver programmes (mainly NVQs) for private full fee-paying candidates, Council employees and to other 25+ learners in the Early Years and Health & Social Care areas via an ESF contract managed by Providers in Partnership (PIP).
38. The Centre was successfully involved in the Train to Gain 'pilot' last year with a qualification success rate of over 80% - one of the best success rates in the region. Unfortunately, however, the Centre was not successful in the general bidding round for the new programme and is currently looking to take advantage of some LSC 'Regional Response' funding in order to get back on board. The Centre has a large number of learners waiting to commence NVQ level 2 qualifications in Early Years and Health & Social Care and a high expectation from employers in the sector for this to happen.
39. The financial situation for the current financial year is, as ever, very tight, though the new E2E Level 1 apprenticeship contract has helped considerably. The financial position for the new academic year is still unclear in some cases relating to the uncertainties in recruitment of new learners from September 2007. However, it is clear that what should be a significant increase in fees to schools for this programme will not be popular and may have a negative effect with regard to recruitment in the new academic year.
40. York Training Centre (jointly with Adult and Community Learning) was inspected by the Adult Learning Inspectorate in November 2006. The report published on 5 January this year concluded that both provisions were overall 'good', putting City of York Council in the top quarter of quality provision.

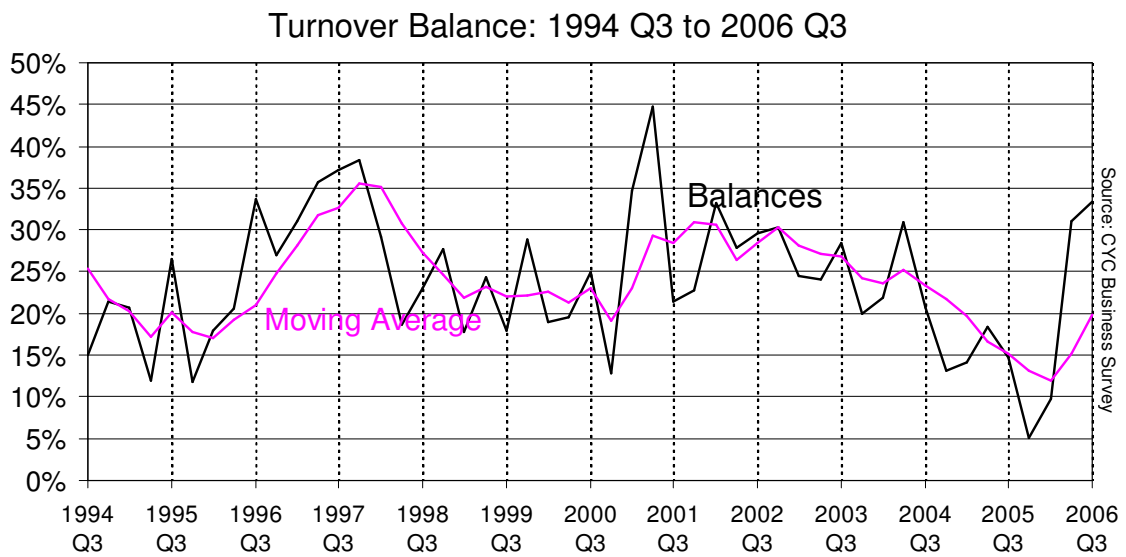
City Centre Partnership Ltd

41. The first major research questionnaire designed to test the appetite for a BID (Business Improvement District) was sent to over 1600 City centre businesses in the latter half of February. Accompanied by a special BID Newsletter explaining how the scheme would operate, the survey aims to establish initiative priorities and initial interest. The survey can also be completed on-line.
42. Initiative groups continue to progress work on the Action Plan. York in Bloom will be entering the Yorkshire Regional "In Bloom" competition in 2007 after an absence of some years. RACY (Retailers Against Crime in York) are completing a Service Level Agreement to formalise their relationship with North Yorkshire Police. YCCP sponsored the Tree of Life in St Helen's Square as part of the Christmas celebrations.
43. The YCCP Board has now agreed to extend representation from the private sector and is now recruiting three new Directors. The Chief Executive, Carolyn Dunn, has also been appointed to the Board. A Memorandum of Understanding between the Partnership and the Council is now in place.

Business Survey

44. The York Business Survey for the third quarter of last year shows a broadly positive picture, with improvements in turnover, employment, and operating capacity. Confidence in future activity has shown a marked increase and local businesses are making an increased, and consistent, use of the internet to both advertise and sell products.

Fig 1. Turnover

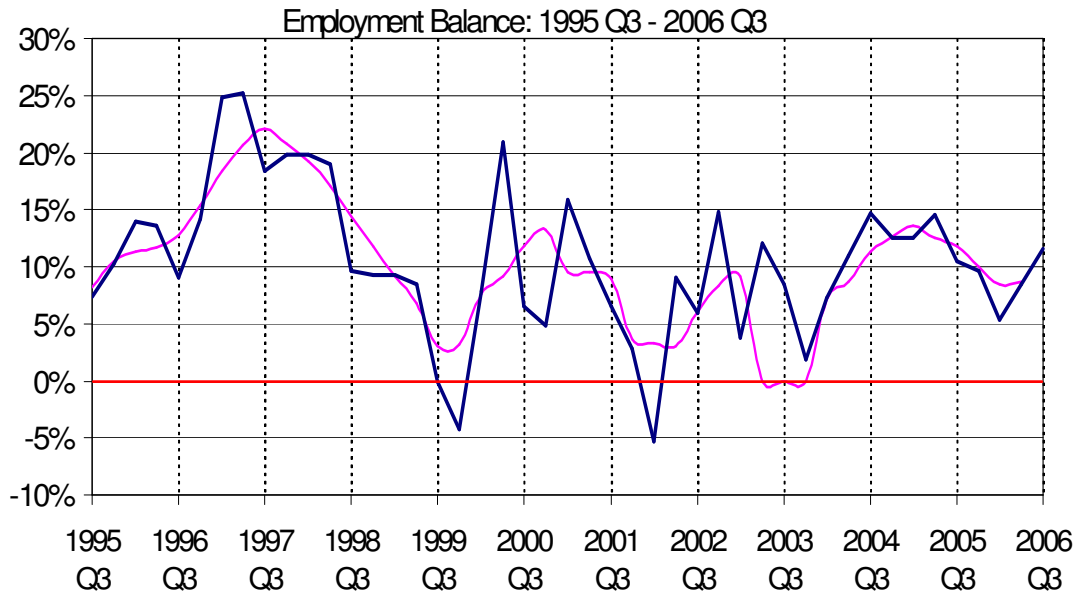


Turnover

	2005 Q3	2006 Q2	2006 Q3
Risen	38.9%	45.4%	46.9%
Fallen	24.2%	14.3%	13.5%
Balance	14.7%	31.1%	33.4%

45. The Turnover chart shown as Figure 1 is intended to show the broad trend in turnover balance – with the smooth trend line being the more important than the quarterly observations. This peaks around mid-2001 since when it has exhibited a steady decline. In the last two quarters however, turnover has begun to pick up - and this may be the beginning of a longer trend if local and national economic factors remain favourable. Actual proportions of businesses reporting rising and falling levels of turnover over the last quarter and a year ago for comparison are shown in the table above.

Fig 2. Employment



Employment

	2005 Q3	2006 Q2	2006 Q3
Risen	26.3%	16.8%	21.9%
Fallen	15.8%	8.4%	10.4%
Balance	15.5%	8.4%	11.5%

46. **Figure 2** provides a broad view of employment balance over the last 11 years. As the table below it shows, the balance figure is calculated by subtracting those businesses reporting a rise in employment from those expecting a fall – as is done in national surveys such as those conducted by the CBI. The overall balance has been declining over recent quarters, following a rise in 2003/4. However there are signs of improvement and in that 11 year period the smoother trend line has never suggested a larger proportion of firms losing staff than taking on staff – even in difficult periods of low demand or restructuring among local employers.

Operating Capacity

	2005 Q2	2002 Q2	2006 Q3
Full Capacity	16.8%	18.6%	21.9%
Above 70%	58.9%	86.7%	65.7%

47. The table above shows **operating capacity** across firms – those operating at full capacity has grown by just over 3 points since the last quarter and by over 5 points compared to the same period a year ago. While there has been some reduction in the proportion of firms operating above 70% capacity over the last quarter, this group also grew by just under 7 points over the year.
48. The main indicator of confidence is that of **future turnover levels** and the table below shows these for the quarters shown:

Expected Turnover

	2005 Q4	2006 Q3	2006 Q4
Risen	34.7%	41.2%	40.6%
Fallen	26.3%	9.2%	10.4%
Balance	8.4%	32.0%	30.2%

49. Confidence of turnover in the 4th Quarter of 2006 fell back a little from views expressed three months before – from a balance figure of 32% looking into 2006 Q3 to 30.2% looking to 2006 Q4 – a fall of just under 2 points. This deterioration on the previous quarter was compensated for however by a near 22 point improvement on the position a year ago. For many businesses, particularly those in retailing, hotels and restaurants there is a strong seasonal component to trading levels and the fourth quarter is an especially busy time. The next survey will reveal whether these predictions that turnover would be much firmer than a year ago materialised.
50. One growing phenomenon in the business world is the increased use that businesses are making of the **Internet** and this topic has been covered in the business survey for nearly two years, starting in the last quarter of 2004.
51. Around 40% of firms in York use the Internet in some form to achieve sales while about three-quarters of all firms use the 'Net to provide information to their customers. Around half of all firms make use of the Internet to advertise their goods and services to a wider audience while fewer and fewer make no use of the Internet at all – from over one in five 2 years ago to just one in eight towards the end of last year.
52. The proportion of businesses who have seen the advantages presented by securing a broader customer base, and have used the internet as one means of achieving this - including those who live overseas, has remained broadly constant at an average 28% but there are likely to be sectors where this has been greater. In retailing for example, more businesses can be seen to be using the Net for providing information to customers, although the proportion who have made it possible for their customers to buy on-line remains fairly constant at 35%. Around a third of retailers also make up to a quarter of all sales on the Net – important when

retailing is facing continuing cost pressures and narrowing margins on the High Street. Although retailers have seen sales achieved through this route rising, in more recent quarters it has begun to level off, so that for now this proportion looks set to remain fairly constant.

53. One question in the survey has been prompted by an Audit Commission performance indicator which measures how satisfied businesses are in the city or region in which they are located. This question has been in the York Business Survey now for four quarters and on average 95% of businesses regard York as a 'good' or 'satisfactory' location for their business while just 1.25% actively consider the city to be 'poor'. Around 4% feel unable or are unwilling to express a view on this in a single question.

Risk Management

54. In compliance with the council's risk management strategy. There are no risks associated with the recommendations of this report.

Recommendation

55. The Board's input and endorsement is requested.

Reason: To help shape the effectiveness of future action.

Contact Details

Author:

Roger Ranson
Assistant Director Economic
Development & Partnerships
Phone No: 01904 551614

Chief Officer Responsible for the report:

Bill Woolley
Director of City Strategy

Report Approved



Date 26 Feb. 07

Specialist Implications Officers: None

Wards Affected:

All



For further information please contact the author of the report

Background Papers: Progress on key issues report 26 September 2006

Annexes - Annex 1 – Performance Indicator – Business Performance VJ15c - e
Annex 2 – Performance Indicator – Unemployment in York VJ15a and VJ15b
Annex 3 – Tourism Trends
Annex 4 – Employment Activity (2000 – 2006) - Unemployed

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Business performance Performance Indicator

VJ15d

Annex 1

Turnover (Sales) Balance

Looking over past Quarter

Quarterly
Moving av.

PI VJ15d
'Maintain the York Business Survey moving average Turnover net Balance figure above 20% reflecting turnover or sales levels among York firms'

Yr/Qtr	Surveyed	Balance	Quarterly Moving av.
2001 Q3	October	21.5	
2001 Q4	January	22.7	
2002 Q1	April	33.3	
2002 Q2	July	27.9	
2002 Q3	October	29.6	
2002 Q4	January	30.3	
2003 Q1	April	24.5	
2003 Q2	July	24.0	
2003 Q3	October	28.4	
2003 Q4	January	19.9	
2004 Q1	April	21.9	
2004 Q2	July	30.9	
2004 Q3	October	20.6	
2004 Q4	January	13.2	
2005 Q1	April	14.2	
2005 Q2	July	18.4	
2005 Q3	October	14.7	
2005 Q4	January	5.1	
2006 Q1	April	9.8	
2006 Q2	July	31.1	
2006 Q3	October	33.4	

The balance figure for the indicator is provided by subtracting the respondents who said their sales were falling from those who said their sales were rising. A Quarterly Moving Average figure is then calculated to smooth out some of the seasonal up and down movements in the indicator. A number of respondents will also remark that their position has not altered.

The most recent result is shown in bold text, with comparable quarters also highlighted

Business confidence Performance Indicator

VJ15c

Annex 1

Expected turnover levels

Looking to Quarter ahead

Yr/Qtr	Surveyed	Balance	Quarterly Moving av.	PI	VJ15c
2001 Q4	October	19.6		'Maintain the York Business Survey moving average Expected Turnover net Balance figure above 20% reflecting confidence in future turnover or sales levels among York firms'	
2002 Q1	January	41.5			
2002 Q2	April	47.7			
2002 Q3	July	45.0	38.5		
2002 Q4	October	25.4	39.9		
2003 Q1	January	36.2	38.6		
2003 Q2	April	44.1	37.7		
2003 Q3	July	40.0	36.4		
2003 Q4	October	21.3	35.4		
2004 Q1	January	34.6	35.0		
2004 Q2	April	39.7	33.9		
2004 Q3	July	45.4	35.3		
2004 Q4	October	26.0	36.4		
2005 Q1	January	34.9	36.5		
2005 Q2	April	40.8	36.8		
2005 Q3	July	22.3	31.0		
2005 Q4	October	8.4	26.6		
2006 Q1	January	24.4	24.0		
2006 Q2	April	9.8	16.2		
2006 Q3	July	32.0	18.7		
2006 Q4	October	30.2	24.1		

The balance figure for the indicator is provided by subtracting the respondents who said they expected their sales to fall from those who expected their sales to rise. A Quarterly Moving Average figure is then calculated to smooth out some of the seasonal up and down movements in the indicator. A proportion of respondents will also remark that their position has not altered.

The most recent result is shown in bold text, with comparable quarters also highlighted

Employment Balance Performance Indicator

VJ15e

Annex 1

Employment Balance

Looking over past Quarter

Quarterly
Moving av.

PI VJ15e
'Maintain a positive York Business Survey moving average Employment net Balance figure'

Yr/Qtr	Surveyed	Balance	Quarterly Moving av.
2001 Q3	October	6.5	
2001 Q4	January	2.8	
2002 Q1	April	-5.3	
2002 Q2	July	9.0	
2002 Q3	October	5.9	
2002 Q4	January	14.8	
2003 Q1	April	3.8	
2003 Q2	July	12.0	
2003 Q3	October	8.4	
2003 Q4	January	1.9	
2004 Q1	April	7.2	
2004 Q2	July	11.0	
2004 Q3	October	14.6	
2004 Q4	January	12.5	11.3
2005 Q1	April	12.5	12.7
2005 Q2	July	14.6	13.6
2005 Q3	October	10.5	12.5
2005 Q4	January	9.7	11.8
2006 Q1	April	5.3	10.0
2006 Q2	July	8.4	8.5
2006 Q3	October	11.5	8.7

The balance figure for the indicator is provided by subtracting the respondents who said their employment levels were falling from those who said their employment levels were rising. A Quarterly Moving Average figure is then calculated to smooth out some of the seasonal up and down movements in the indicator. A number of respondents will also remark that their position has not altered.

The most recent result is shown in bold text, with comparable quarters also highlighted

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Performance Indicator - Unemployment in York -VJ15a and VJ15b

Annex 2

ILO/OECD Count - those actively seeking work and available to start in York: 2,553 (2.3% workforce, 2.8% resident workforce)

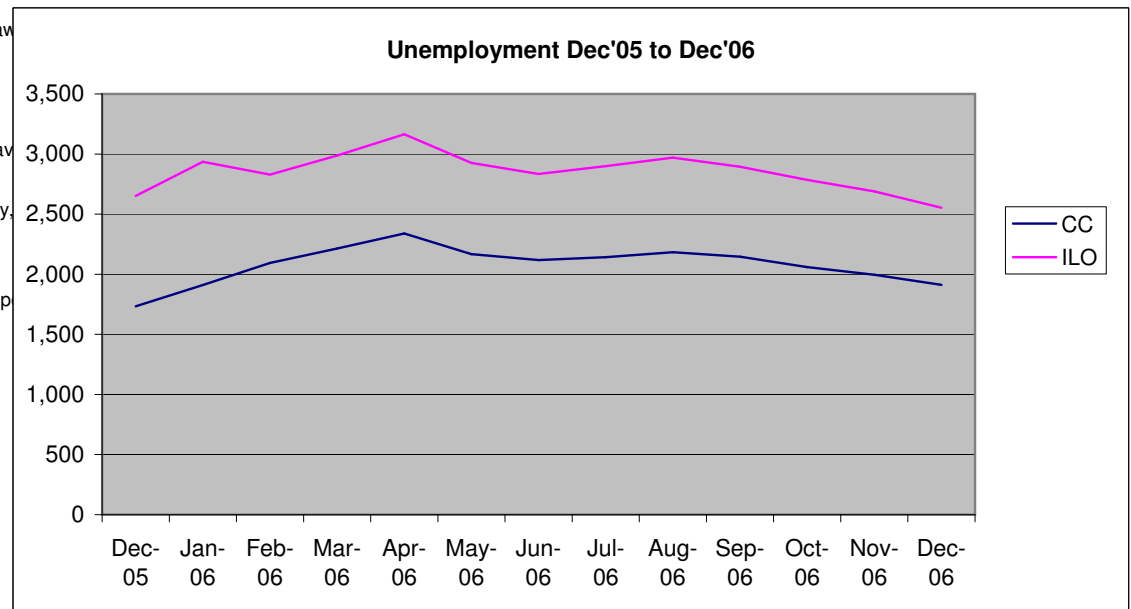
Claimant Count and Unemployment Rates in York compared to Region and UK (workforce rate)

Date	York	Rate	Region	Rate	UK	Rate	York MA	Regional MA	UK MA	York below Region by at least 1.5%	York below UK by at least 1.0%
Dec-2005	1,733	1.5	82,514	3.2	892,711	2.9	1.5	3.0	2.8	1.5	1.3
Jan-2006	1,910	1.7	88,882	3.4	955,335	3.0	1.5	3.1	2.8	1.5	1.3
Feb-2006	2,094	1.9	91,258	3.5	984,664	3.1	1.5	3.1	2.8	1.5	1.3
Mar-2006	2,214	2.0	92,070	3.5	989,136	3.1	1.6	3.1	2.9	1.5	1.3
Apr-2006	2,339	2.1	90,583	3.4	981,198	3.1	1.6	3.2	2.9	1.5	1.3
May-2006	2,168	1.9	87,730	3.4	965,744	3.1	1.7	3.2	2.9	1.5	1.2
Jun-2006	2,118	1.9	87,730	3.3	952,890	3.0	1.7	3.2	2.9	1.5	1.2
Jul-2006	2,142	1.9	88,636	3.4	960,840	3.0	1.7	3.3	3.0	1.5	1.2
Aug-2006	2,184	1.9	89,146	3.4	958,881	3.0	1.8	3.3	3.0	1.5	1.2
Sep-2006	2,146	1.9	88,249	3.4	952,909	3.0	1.8	3.3	3.0	1.5	1.2
Oct-2006	2,060	1.8	86,529	3.3	933,661	3.0	1.8	3.4	3.0	1.5	1.2
Nov-2006	1,995	1.8	85,365	3.2	922,069	2.9	1.8	3.4	3.0	1.5	1.2
Dec-2006	1,912	1.7	86,166	3.3	923,460	2.9	1.9	3.4	3.0	1.5	1.2
12 mnth av:										1.53	1.24

Data sources: NOMIS (National On-line Manpower Information System) and Taylor Associates

Notes:

- Table: 'MA' denotes moving average: each monthly rate is an average figure of the previous twelve months. This smoothes out some of the monthly swings in unemployment, producing a clearer trend line. For information, raw percentage rates are shown in the '%' column after each area.
- Because official unemployment rates are now calculated on a residents basis for areas below regions, the York % rate is estimated for November 2002 onwards when workplace-based rates ceased, once again, to be available.
- Members should be aware that the measure of unemployment used here is the narrow, and largely unsatisfactory, Claimant Count, which measures only those people receiving benefits while they are unemployed. It is used here to ensure commonality across the three areas shown and should be seen as a proxy measure of economic activity rather than as a measure of the true extent of the problem of unemployment for local people.
- The shaded columns demonstrate the two unemployment performance indicators used by the Council, the Claimant Count and the ILO measure.
- Graph: This shows the numbers of people seeking work in the city, the ILO measure, as the higher line. The lower, broken line, charts the narrower Claimant Count measure.
- Members should also be aware that official unemployment data is always subject to revision, rounding of figures to one decimal place in the table may appear to suggest arithmetical errors.
- York workforce estimated at 113,000 source: Jobs Density 2003 ONS
- Economically active used as the resident workforce denominator: 91,400 Source ONS



Date	<small>cc</small> CC	<small>ilo</small> ILO
Dec-05	1,733	2652
Jan-06	1,910	2936
Feb-06	2,094	2829
Mar-06	2,214	2988
Apr-06	2,339	3165
May-06	2,168	2926
Jun-06	2,118	2835
Jul-06	2,142	2899
Aug-06	2,184	2970
Sep-06	2,146	2894
Oct-06	2,060	2785
Nov-06	1,995	2689
Dec-06	1,912	2553

Workforce **113000** **2.3%**
 (Job density 2003)
 Economical **91400** **2.8%**
 active
 (resident
 workforce)

YORK/NATIONAL TOURISM TRENDS: RESULTS TO NOVEMBER 2006

a) York accommodation trends (figures from the Yorkshire Tourist Board, based on a sample of accommodation providers of different sizes)

In 2005 calendar year bed and room occupancy figures were down 2-3% on 2004. Trends so far in 2006 are poor – better at the start of the year than in the summer/autumn, but they contrast with somewhat better trends on attractions visits (see b) below)

Bed occupancy	1998	1999	2000	2001	2002	2003	2004	2005	2006
January	31.8%	29.0%	29.8%	22%	24.2%	24.5%	27.5%	27.8%	25.3%
February	35.4%	41.4%	46.8%	40.6%	42.7%	43.4%	44.2%	40.6%	43.0%
March	48.2%	48.7%	48.0%	42.0%	48.0%	44.8%	44.3%	43.5%	39.6%
April	59.0%	54.8%	60.0%	51.4%	46.7%	52.9%	53.2%	45.8%	51.6%
May	61.6%	60.1%	56.0%	55%	48.5%	54.7%	57.3%	50.2%	49.1%
June	57.7%	60.2%	58.6%	57.3%	59.1%	53.1%	60.7%	52.9%	49.6%
July	71.4%	71.5%	56.2%	52.4%	62.1%	58.7%	61.5%	58.0%	57.0%
August	74.2%	68.9%	64.7%	62.9%	62.8%	62.9%	63.2%	61.0%	56.0%
September	67.8%	67.2%	61.9%	56.2%	54.2%	55.9%	53.8%	52.7%	54.8%
October	66.1%	67.0%	61.1%	49.5%	62.3%	54.9%	56.5%	56.8%	48.5%
November	46.9%	48.9%	30.2%	49.4%	50.5%	43.9%	46.5%	45.1%	43%
December	40.5%	39.9%	33.6%	33.1%	37.7%	36.1%	42.8%	41.4%	
Annual average	55.0%	54.8%	50.6%	47.7%	49.9%	48.8%	50.9%	48.0%	

Room occupancy	1998	1999	2000	2001	2002	2003	2004	2005	2006
January	44.8%	39.1%	41.3%	31.9%	38%	37.2%	39.8%	40.3%	38.8%
February	52.0%	53.9%	59.4%	51.3%	58.2%	57.4%	56.0%	53.9%	59.0%
March	60.9%	62.2%	67.1%	55.9%	64.7%	60.2%	59.7%	54.4%	57.2%
April	70.2%	68.0%	71.1%	61.9%	62.2%	65.3%	63.8%	61.6%	65.1%
May	73.4%	70.7%	70.6%	70.3%	64.8%	66.7%	70.5%	63.3%	62.5%
June	76.7%	76.3%	69.1%	73.2%	73.1%	65.9%	75.2%	70.3%	59.3%
July	82.8%	84.1%	67.6%	66.6%	75.4%	73.0%	76.0%	74.5%	70.9%
August	81.1%	75.0%	73.7%	77.6%	74.8%	74.9%	76.1%	72.5%	69.5%
September	82.3%	82.7%	77.8%	65.5%	69.7%	71.9%	72.3%	71.8%	66.6%
October	78.4%	80.4%	73.5%	60.2%	77.3%	68.5%	72.5%	74.1%	57.9%
November	60.4%	64.5%	47.6%	63.5%	61.9%	59.3%	65.8%	63.9%	58.4%
December	50.0%	51.2%	41.4%	41.5%	51.4%	44.6%	53.8%	54.5%	
Annual Average	67.7%	67.3%	63.3%	60.0%	64.3%	62.1%	65.1%	62.9%	

b) Visits to attractions

The **Visitor Attractions Monitor** assesses the number of visitors to a sample of attractions in the city.

Here's some comparisons with the same month a year earlier. In contrast to hotel occupancy for eight out of eleven months of 2006 visitor numbers to attractions were up on the same period last year.

Jan 05 (cf Jan 04)	+1%	Jan 06	+8%
Feb 05	+1%	Feb 06	+9.9%
Mar 05	+36% (Easter was early)	March 06	-31.4% (Easter late)
April 05	-24%	April 06	+75.2% (Easter= April)
May 05	-5.7%	May 06	-2.3%
June 05	-22.9%	June 06	-5.8%
July 05	-3%	July 06	+2.7%
Aug 05	+3%	August 06	+13%
Sept 05	+4%	September 06	+11%
Oct 05	+1.8%	Oct 06	+7.1%
Nov 05	+9.8%	Nov 06	+9%
Dec 05	-1.1%		

c) UK trends (from International Passenger Survey, through www.statistics.gov.uk)

The latest figures available are for December 2006.

Overseas visitor numbers to the UK fell by 2% in the three months to December 2006 compared to the previous three months and total spending decreased by 3%. Visitor numbers compared to October-December 2005 were up by 6%.

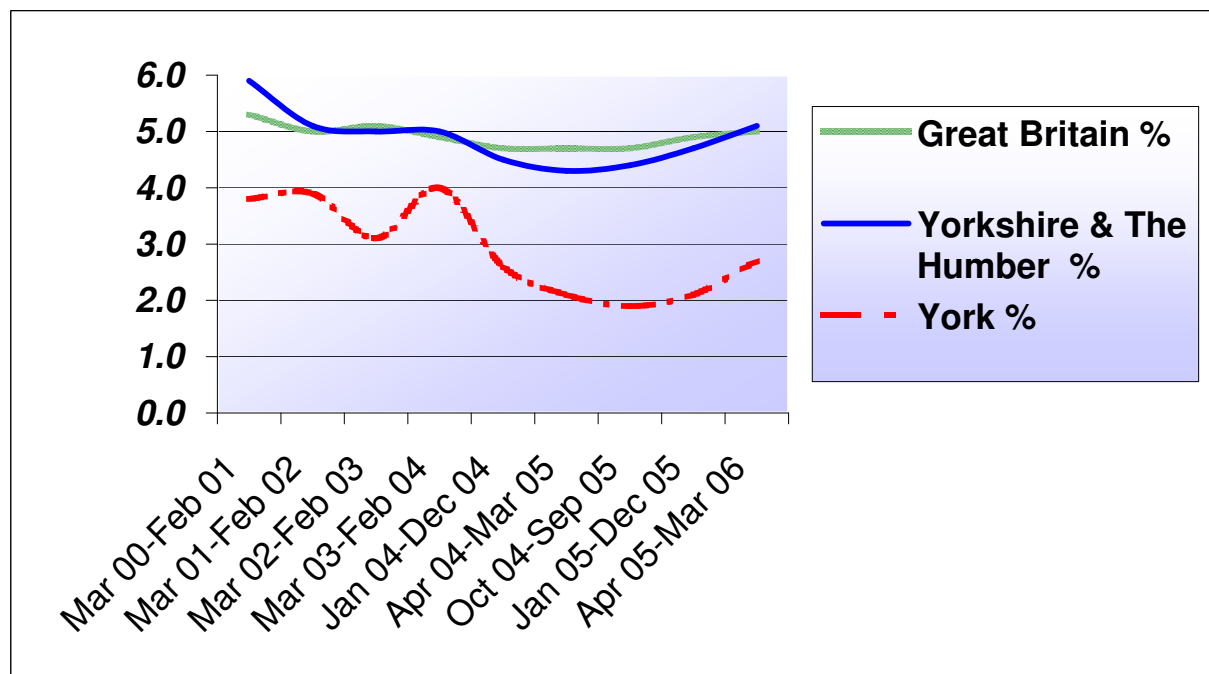
Over the full 12 months period to July 2006 overseas residents' visits to the UK increased by 7% compared to a year earlier (from 30 mn to 32.2 mn). This increase splits between Western Europe (+7%), North America (+6%) and the rest of the world (+9%). The positive North American trend is a recent recovery (in the past six months) as previously their trends have been downwards.

NB Overseas earnings (i.e. the expenditure of overseas visitors to the UK) in this twelve month period increased by 8% to £15.4bn, and expenditure by UK residents abroad rose by 4% to £33.4bn. This has widened the "trade deficit" by £0.1bn over the previous twelve month period.

tren2006/12207

Date	Great Britain	Yorkshire & The Humber	York
	%	%	%
Mar 00-Feb 01	5.3	5.9	3.8
Mar 01-Feb 02	5.0	5.1	3.9
Mar 02-Feb 03	5.1	5.0	3.1
Mar 03-Feb 04	4.9	5.0	4.0
Jan 04-Dec 04	4.7	4.5	2.6
Apr 04-Mar 05	4.7	4.3	2.1
Oct 04-Sep 05	4.7	4.4	1.9
Jan 05-Dec 05	4.9	4.7	2.1
Apr 05-Mar 06	5.0	5.1	2.7

SOURCE: Annual Population Survey



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