

YORK

ANNEX 2

PERCEPTION BASELINE RESEARCH - EXECUTIVE SUMMARY

This report

This report is an executive summary of the research process and evidence base sitting behind the York Narrative, carried out by Hemingway Design, Creative Tourist Consults, For The Love of Place, Mediale and City of York Council between March and October 2019.

The report focuses on presenting the key insights which informed the strategic decision-making of the city - groups of partners which were established to supply oversight of the project and process and which met to receive evidence findings at various points throughout the project timeframe.

This report draws on a wealth of detailed and robust datasets, all of which is available as an evidence base of each part of the process – the different resources are available to view [online here](#)

EXECUTIVE SUMMARY

ONLINE SURVEY RESOURCES

CONSULTATION & ENGAGEMENT RESOURCES

DESK RESEARCH RESOURCES

TESTING & VALIDATION RESOURCES

Our primary purpose

We assessed the strength and range of current perception of and associations with York, by different target groups, to inform the overall place-brand narrative programme which is to:

“Create a place brand narrative that will give focus to York’s purpose by defining a set of values and behaviours that inspire and influence strategy, policy and decision-making.”

and, in doing so, to establish a baseline against which to measure change in perception over time.

The hypothesis

The starting point was a hypothesis that the 2019 perception of York and what it offers is out of kilter with the day to day experience of living, working, studying or visiting the city, and to the future detriment of the city - affecting investment, talent attraction and employment, business growth and reputation.

It was felt the reality of York is overwhelmed by its heritage tourism image and that negative impacts are felt by some organisations and businesses in the city.

There is a counter-concern that this is not the case for all partners; there might be a gap between the different needs, wants and understandings of different groupings of stakeholders, including residents.

A truthful place-brand narrative for the city of York therefore could not be developed without understanding these opposing views. Research was therefore needed to establish **a perception baseline to find out:**

- How different market segments currently perceive York and identify any key differences between them;
- What people value and want of the city - what they would like it to be known for in the future;
- How this might impact on the creation of a cohesive and meaningful place-brand narrative – one that is reflective of many voices.

The methodology

Several activities were designed to capture the widest possible engagement within the timeframe and budget, to inform the place-brand narrative - and then, once developed, to test it. The engagement target was 1,500 engagements and activities included:

- Consultation with public and private sector stakeholders to get **expert input and scope ambition** from strategic partners and agencies;
- Workshops and events facilitated via City of York Council with local business networks and resident groups to get qualitative inputs and **diverse perspectives**;
- Masterclasses and webinars with stakeholders, businesses and students to gather further views and to **promote understanding** of the place brand narrative process and the value it brings to a place;
- An online survey to capture responses from each of the different target audiences, to build a robust dataset which can be analysed to test different viewpoint and **establish a perception baseline**;
- Market testing and validation with stakeholders and businesses (via Brand Filter Workshops), young people (via Mediale) and residents (via City of York Council) to **check resonance and refine the narrative**.

Stage 1

APRIL - JULY 2019

‘Let’s talk about York...’

Summary of online survey

AIM

The aim of the survey was to find out what is in people's minds when they think about York, how knowledgeable they are about the city and how their perceptions affect how they view and rate the city for a number of different factors.

It's purpose was to create a perception baseline to inform the York narrative, set direction and establish a baseline against which changes in perception can be measured in the future.

METHODOLOGY

The same questionnaire was used with all respondents, creating a single dataset, capable of being analysed in depth and across a range of different segment types and criteria.

In York it was distributed largely via digital and social media channels of the participating partners, and beyond York to a purchased dataset of 500 UK adults who take city breaks

- The local resident community – all wards and demographic profiles
- The university community – including academics, students, partners
- The business community – including investors, employers, employees
- The tourism community – including tourism partners, businesses, visitors

Online Survey: methodology and reach

2,638 people completed an online survey which generated a rich-data set capable of being dissected in numerous different ways – by geography, socio-economic profile, age, professional interest, history and familiarity with York & so on.

The size and diversity of the dataset gives confidence that lots of voices have been heard. The dataset can be understood by different audiences including:

- York residents
- Commuters
- Students
- Leisure visitors
- Investors
- Business owners
- Employees
- Those familiar and unfamiliar with York



Online Survey: key takeaway

The priority in analysing the dataset was to consider the overall strength of York's perception, and at the same time look for evidence of variance between the different audiences.

We found that it doesn't matter how we drill into this dataset, the dominant associations of York remain pretty much the same regardless of the profile of the respondent, their familiarity with or their relationship with York.

Which ever way the dataset is cut the overriding message is that **York is seen by most respondents as a beautiful place for heritage tourism.**



Online survey: comparison examples

To further illustrate, the chart below shows how the similarities are far more resonant than the differences across the different segments. Whilst negatives appear in the top 10 of the business sector, the frequency is low.

These associations do feature in the overall top 20 associations, along with other negatives, primarily due to resident responses. There are almost no business associations in the entire dataset.

	Residents		Non-Residents		All 15-24s		All 25-34s		All Business	
1	Historic	810	Historic	468	Historic	119	Historic	266	Historic	144
2	Beautiful	340	Minster	210	Beautiful	50	Beautiful	96	Beautiful	61
3	Tourism	229	Beautiful	162	Home	30	Tourism	74	Tourism	41
4	Home	211	Tourism	96	Pretty	27	Home	67	Friendly	26
5	Busy	146	Old	91	Busy	27	Busy	52	Minster	25
6	Minster	133	Viking	70	Tourism	24	Minster	44	Home	20
7	Expensive	113	Busy	68	Small	22	Expensive	39	Walls	19
8	Friendly	105	Walls	67	Minster	17	Old	36	Stags/Hens	18
9	Small	76	Cultural	56	Old	16	Cultural	34	Old	17
10	Old	74	Friendly	50	Boring	16	Pretty	33	Drunks	16

Online survey: image association

From a selection of 12 images, 2 were most likely to be selected as most representative of York, plus a further 4 that also rated.

Again, it doesn't matter whether residents, commuters or other UK-residents; young, old; visitors, workers, businesses... York is primarily associated with its beautiful historical image.

Indeed under 35s (49%) are more likely to associate York with Vikings than 65+ (37%).



Online survey: image association

The three images most likely to be selected as least representing York. These images represent, to some degree, features of York that the city would like to be better known for, but they are just not cutting through.

“Despite two unis York hasn’t got much youth culture or alternative culture.” (Resident, F, 55-64)

“York is not a modern city. This needs to be address and changed as its seen as being backwards thinking.” (Resident, M, 35-44)

“I don’t think of York as commercial or business-centric, which that image conveyed to me.” (Resident, F, 35-44)

“York relies too much on the tourist trade and students. What we need is a contemporary cultural offering for residents that encourages the city to move away from its conservative roots.” (Resident and Business Owner)



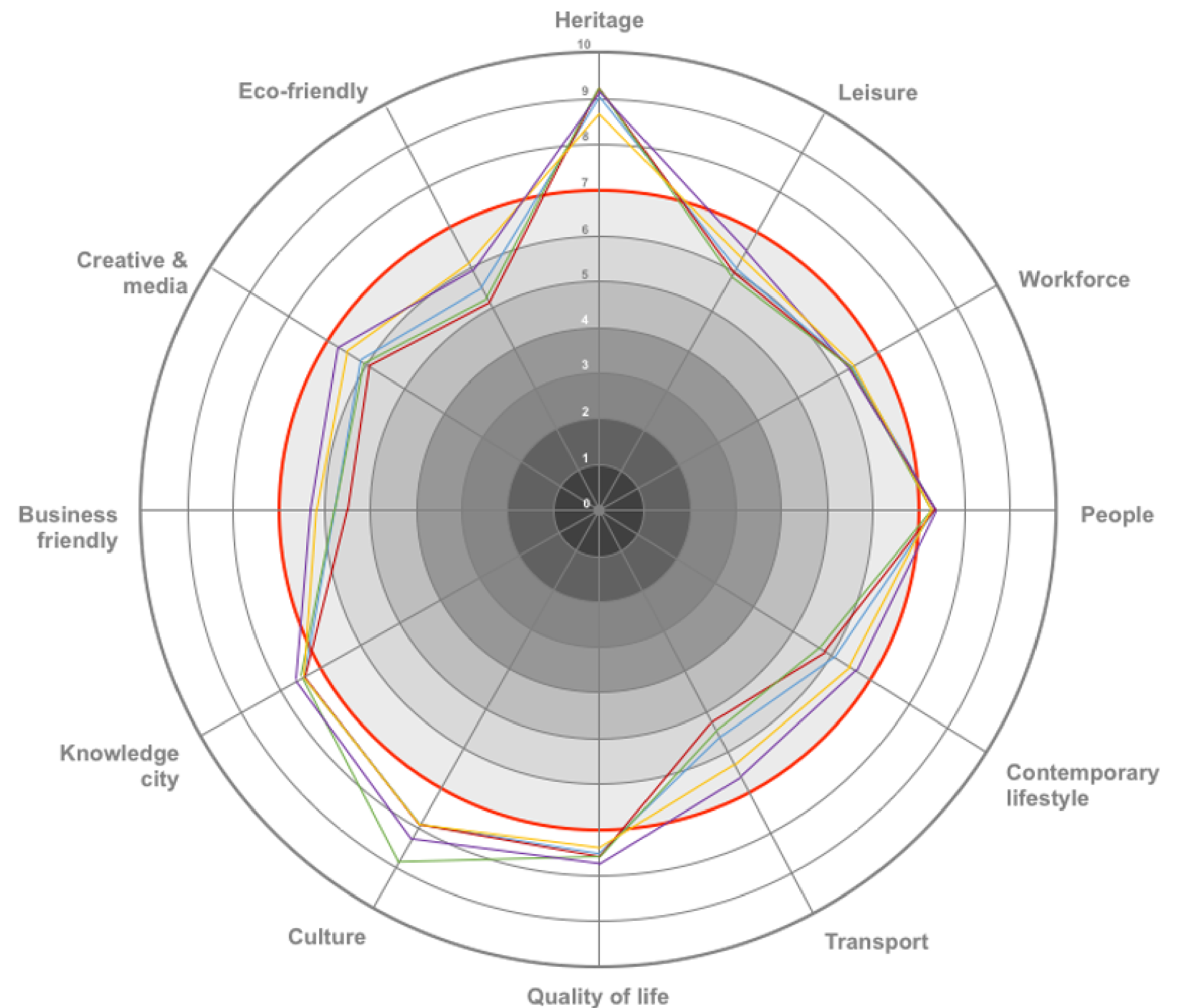
Online survey: rating

Respondents rated York on scale of 0-10 for a number of attributes that the city would like to be known for. Further analysis reveals that there is a difference in strength of feeling.

Over 60% of respondents rated York 7 or more for: Heritage (89%), Culture (69%) and Quality of Life (61%)

Whilst less than 30% rated York 7 or more for: Contemporary lifestyle (30%), Leisure (28%), Transport (26%), Business friendly (22%), Creative and media (29%), Eco-friendly (18%)

York residents and local commuters were more likely to rate transport low.



KEY

All ● York Residents ● York Commuters ● Rest of UK ● International ●

Online survey: awareness

We might assume that local residents have good local knowledge and it is the case that local people recognise:

- The 2 universities (96% of locals compared with 59% of rest of UK)
- The railway city (91% of locals compared with 63% rest UK)
- Journey time to London (92% of locals (o 55% rest of UK)
- Best Place to Live awards (76% of locals compared with 33% rest of UK)

For other 'factors' local population knowledge is broadly the same as rest of UK.

Even for those engaged in the arts/media, recall of City of Media Arts and Gigabit city is similar.

'Founding City of Science' and Human Rights City have lowest recall of all (17%).

Under35s are least likely to know about these or City of Media Arts.

Respondents with higher socio-economic status are most likely to have good local knowledge.

Online survey: sentiment

Overall there is positive strength of feeling towards York from both residents and non-residents, which aligns with other available studies (like tourism data).

People of all types and locations can imagine themselves living in, visiting, or studying in the city in the near future, or recommending that others do so.

Of non-locals, it is the under 35s who show the most openness to visiting (59%), relocating (37%), studying (16%)

38% of the local business sample would recommend developing business in York. Of those, over 50% of these respondents would prioritise the following ahead of other sectors:

- Creative industries
- Science and technology
- Tourism (aimed at cultural tourists and families)

The majority of verbatim comments start with something warm, fond, sensory and often romanticised about York.

But there is also a real thirst for change which comes through time and again – particularly covering the need to be seen to more dynamic, play to the knowledge economy, create a more sustainable, equal and fair city.

“I like that, no matter where I have been in the world, if someone asks me where I am from and I say York, they always seem to know of it and have something nice to say about it. I feel privileged to live in a city that is deemed a nice place to live by people all over the world.”

“How do we convert something lovely to something more dynamic and exciting?”

“the potential in York is outstanding - it needs to be pushed forward and be made the dream destination for businesses and tourists...”

Summary of stakeholder consultations

AIM

To capture the knowledge and opinions of expert professionals, academics and business people working in and for York across a range of sectors including public services; education, scientific research, social services, voluntary sector, health, transport, culture, creative industries, tourism and hospitality, retail, inward investment, food, property, commerce and professional services.

METHODOLOGY

- 47 stakeholders participate in 1-1 and small group discussions led by Creative Tourist Consults
- 95 stakeholders attend a masterclass in place branding led by For The Love of Place
- 115 invited guests from a range of sectors attend a partner workshop led by Hemingway Design
- 18 employees from 2 local businesses participate in workshops led by Creative Tourist Consults

The full stakeholder consultation report is available as a PDF.

The singular topline messages

The following messages came through in some way by everyone consulted.

- There is more texture and depth in York than people might expect, however it doesn't always have the freedom, support or space to flourish.
- History and its preservation matters but it is not static, and 'lovely' has to be made more dynamic. York's major industries straddle heritage and the future. The heritage of York is a compelling and unique backdrop to city-life rather than the primary focus of it.
- The size of the city makes it possible to do things, make things happen, collaborate, feel connected – but it also affects how people see it – 'small' can get interpreted as lacking ambition or opportunity or diversity.
- There is a very credible and compelling story of world-class scientific leadership and achievement, but too few know about it. The same is true of the creative industries sector. There needs to be a start-up culture and packages for young entrepreneurs.
- The 'now' imperative includes York Central, Unesco City of Media Arts, North Yorkshire LEP and bioscience/food/agrics - Leeds City Region and Creative Industries/Channel 4, The XR Stories programme - and they need to be seen as driving the next 50+years of the city's image and economy.
- York Central is a massive opportunity and cannot be underestimated. There is nowhere else to better grow and develop new outcomes in York. These outcomes aren't just for York - they have a regional, national and even global impact.

The singular topline messages

The following messages came through in some way by everyone consulted.

- York needs to think about its impact regionally, nationally, internationally. It needs to assert itself independently as well as balancing being the heart of the North Yorkshire rural economy and the city region. It is very different to the other Northern Powerhouse cities and this is something to optimise. The shared narrative can help provide a long view
- The golden thread running through York is an ingrained and cross-sector commitment to help people improve their circumstances and live their best life. And how this impacts on quality of life. This is a very liveable city – it has a good mix and scale of amenities, the city experience itself keeps things connected and personal.
- The council cannot be the keyholder to the narrative. Working together strategically is the only way. A major outcome of the place narrative will be if it strengthens working relationships. A tangible and measureable shift here would be an outcome to celebrate.

Summary of resident engagement

AIM

- To ensure that targeted residents who might not engage with the online survey were heard (older, younger, less 'vocal', less affluent)
- To gather qualitative data that could be held up and measured against the online survey, as a sense check and to give confidence that the responses on the online survey match up to broader community feeling.
- To add some qualitative depth.
- To generate interest and buy-in, and drive some people to the online survey

METHODOLOGY

- City of York Council led on this activity:
- Facilitating workshops in the community (86 people in 5 workshops)
- Inviting people to comment on discussion boards in public places around the city (2520 responses)
- Distributing postcards with selected questions (60 postcards)

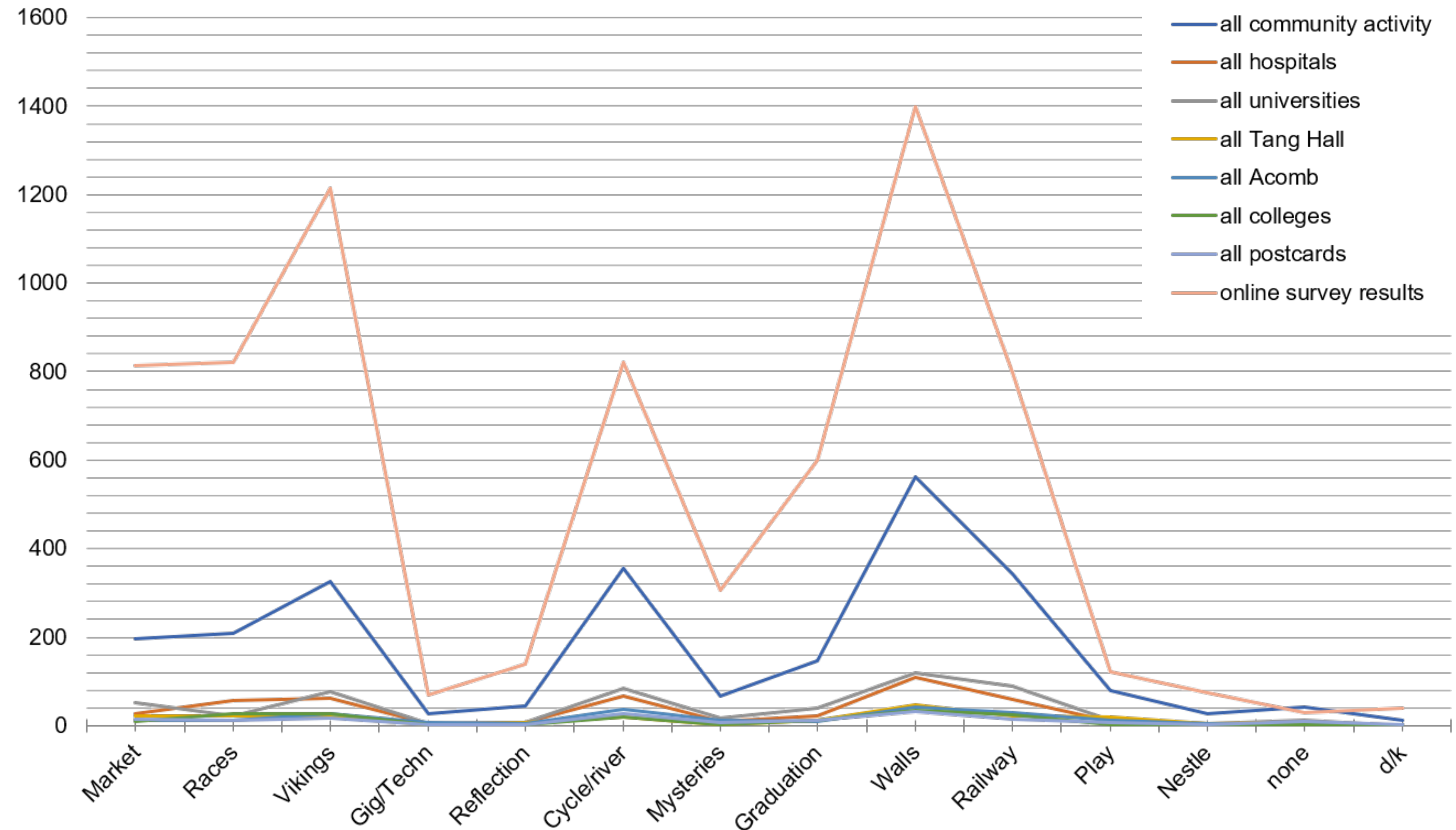
The full resident engagement report is available as a PDF.

Resident engagement: image association

In selecting the images that best represent York, it is clear that the choices of the wider community (captured on boards and postcards) is a mirror image of the online survey.

There is no significant difference between different parts of the community or the wider populace.

York resident response to the image association - via various locations - boards and postcards (June 2019) →



Resident engagement: evolving the narrative

Thinking about the future, discussion was balanced across the groups.

Heritage / tourism matters - but there is shared recognition of need to be forward looking / future thinking / more innovative to secure future of the city

- Role of Universities/ science and tech industries / commerce / professional services sector generally understood to be important
- Some specific concerns at different lifestages
- Young people's future vision was more dynamic - 'happening' / switched on / modern

There is a gap in knowledge and awareness about what is going on - from things to do to the ground-breaking/socially valuable research taking place in the city. Hearing about it generates significant pride in place.

- Local people want the narrative of innovation - social purpose - York's impact on people's lives (including their own) playing back to them.

Stage 2

SEPTEMBER - OCTOBER 2019

‘Let’s test the narrative...’

Summary of testing & validation

AIM

To test the draft core values, their supporting values and the emerging core narrative. Insights from a series of events validated the process, and refined the proposed narrative.

METHODOLOGY

A series of workshops and consultations included engaging with residents around the city, young people and sector professionals from the public, private and third sectors.

Events included:

- Five meetings with different resident associations and ward committees led by City of York Council
- Six Brand Filter workshops – for 47 stakeholders, testing the narrative and values against a number of existing and proposed activities
- Four young people workshops – four sessions, working with four different community / charitable organisations to engage with 31 participants. Ages ranged from 11-23 years. These were arranged by Mediale and partner organisations were: Tang Hall Youth Group, Accessible Arts & Media, York Learning, and Children in Care Council / Speak Up Youth.

The full testing and validation report is available as a PDF.

Testing & validation: feedback

Across all the different sessions, feedback was broadly consistent and the narrative values well received as being reflective of York and aspirational.

- The timeline view of history – past, present & future – was supported and embraced.
- ‘Human scale’ proved most problematic, suggesting both the human and physical environment, but not necessarily together - it needed explanation.

- Pioneering with purpose was well received.
- The pronounced nature of the socially active sector in the city was reflected in the values – but there were concerns – especially from those working in the sector - that it should not appear complacent, or suggest that the job is done.
- The young people contributed a more critical perspective. Like others they rejected the ‘human scale’ terminology, but for many of them the idea of York ‘being the best’ wasn’t credible to them as it isn’t what they see or experience themselves.

Testing & validation: refinements

The second value – human scale – clearly generated the most debate and need to refine.

The consultancy team therefore revisited ‘human scale’ and the subsequent core narrative in the final place brand narrative.

The feedback also includes some information that will be useful to future engagement, implementation and roll out including:

- The ongoing need for further brand filter workshops with delivery partners
- The need to give young people a stage in the process
- The need to communicate more with local residents, including young people, about the success stories and opportunities in the city
- The need for tools to support roll out – include a ‘directory’ of stories and case studies to build up the picture of how York’s past and present is built on the narrative values.

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