

ANNEX 1

YORK TOURISM PARTNERSHIP

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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>