

Yorkshire Forward and Economic Development

Learning Legacy Module 16:

# Tourism and Major Events



YORKSHIRE  
FORWARD  
The Region's  
Development Agency

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## Executive Summary

Yorkshire Forward has been investing in the visitor economy since 2001, when Foot & Mouth disease revealed the importance of the tourism sector to the rural economy. Following the Government's requirement that the Regional Development Agencies (RDAs) perform a strategic lead role for tourism regionally, Yorkshire Forward's knowledge and investment in the sector grew through to 2009 when it took the decision to invest £30 million in the visitor economy over three years. This Learning Legacy module tells the story of Yorkshire Forward's interventions in the visitor economy over the last decade, highlighting the key challenges faced and the lessons learnt that remain pertinent for the post RDA era.

Government gave Yorkshire Forward the strategic lead role for tourism in the region in 2003. In practice this meant determining the regional strategy for the visitor economy and modernising tourism sector support structures at the same time as maintaining funding for Yorkshire Tourist Board and investing directly in the development of the tourism product. Over the first few years of this strategic lead role, it was the structural change in tourism sector support that dominated Yorkshire Forward's and partners interventions as the region struggled to establish a series of sub regional/local Tourism Partnerships across the public and private sector.

By 2006 it was estimated that the visitor economy contributed nearly 6% of total regional output. However, as Yorkshire Forward's knowledge and understanding of the sector grew, it was felt that the region was losing out to competitors and that stereotypical images of the region still prevailed.

Yorkshire Forward's internal seven year review in 2007 recommended enhancing regional marketing. A Task and Finish Group of Yorkshire Forward's Board members was established to examine achievements thus far in supporting the tourism sector, consulting with partners, and learning from others in order to be clearer about strategy, roles and expectations.

The Task and Finish Group process led directly to a significant increase in Yorkshire Forward's support for the tourism sector and the approval of a £30 million three year investment through the Regional Tourism Programme. This was channelled through the re-launched Yorkshire Tourist Board as Welcome to Yorkshire, which led a network of sub regional/local Tourism Partnerships.

Throughout this period, Yorkshire Forward invested directly to support the tourism product around the region. Examples included Dalby Forest Visitor Centre; York Visitor Information Centre; Wentworth Castle; a range of heritage tourism products on the South Bank of the Humber; Harrogate International Conference Centre; as well as various events, including the Clipper Round the World Yacht Race, the Tour of Britain and the Indian International Film Festival.

Over the first two years of operation, Welcome to Yorkshire achieved impressive results, significantly raising the level of ambition and the profile of the tourism sector in the region, and yielding a net return on investment figure of £13.57 for every £1 invested. However,

over this period of strong regional delivery and leadership, some of the Tourism Partnerships struggled and collapsed.

The key lessons learnt over the decade of intervention in the visitor economy are:

- a) **Tourism is a peculiarly political policy area**, local authorities do not invest strategically in tourism, nor do they commit extensive resources, but Members are often disproportionately exercised about tourism related matters.
- b) Within many local authorities **tourism has been seen as a promotional activity rather than being about the management of a destination.**
- c) The tourism sector is characterised by small businesses, a proportion of which are lifestyle businesses, and it is a sector which is used to receiving public sector support. This means that **driving change in this area is a slow process.**
- d) Perhaps because of its geographic remit, the public sector (chiefly local government) can tend to adopt a flawed **supply side approach to promotion**, i.e. selling what is in a particular area (e.g. based on district boundaries) rather than a consumer facing approach.
- e) **A good evidence base is crucial** and the traditional understanding of the visitor economy in Yorkshire and Humber was that it was dominated by North Yorkshire. In fact, Leeds generates the most income from the visitor economy in the region.
- f) The **relationship between tourism strategy and economic strategy is complex and** can be easily confused. Clear understanding and roles assists co-ordinated progress.
- g) **Setting the 5% growth in annual visitor spend target and sticking with it**, was probably the most significant unifying factor that brought together the disparate tourism support bodies across the region, as for the first time intervention was driven by the same goal.
- h) In the last two years, Yorkshire Forward's **increased investment in support for the visitor economy has yielded real results.**

The challenge now, as the RDA is being abolished, is to continue to derive a legacy from the recent level of investment by Yorkshire Forward, as the wider policy public sector context changes completely and the new Government Tourism Policy favours local leadership with national support.

# 1. Task and Purpose

Yorkshire Forward's initial intervention in the tourism sector came as a result of Foot & Mouth disease (FMD) in 2001 which was estimated to have cost the tourism sector regionally in excess of £125 million<sup>1</sup> (see module 3: response to economic shocks). Following this, in 2003, Government gave responsibility for regional tourism to the RDAs. They were charged with a strategic lead role and required to channel Government funding for the Regional Tourist Boards (the Yorkshire Tourist Board in Yorkshire and Humber) which was ring fenced for three years. As a result of this, Yorkshire Forward began to look at and understand the importance of the tourism sector to the region's economy, the evident market failure, the opportunity for growth and thus the case for investment.

This case was based on:

- Tourism being an economically important element of the regional economy;
- Tourism contributed 5.7% of total regional output in 2006, a higher proportion than the case nationally<sup>2</sup> (where tourism, or more accurately, the visitor economy<sup>3</sup> is made up of accommodation, restaurants, bars, culture, amusements, sporting activities and other recreation);
- The sector employing 187,774 people (in 2006), of which 43.4% were full time<sup>4</sup>;
- The industry being fragmented, characterised by small businesses and often slow to respond to change. There were over 20,000 tourism business (this figure does not include very small businesses) in 2006, but none of the region's top 100 companies were in the tourism sector and 77.5% of tourism businesses had less than 10 employees<sup>5</sup>;
- The region was losing ground to its competitors with tourism promotion relying on traditional messages that compounded stereotypical perceptions of Yorkshire and Humber and were not reflective of the physical changes within the region;
- The market itself not being able to deliver regional promotion because of the issue of 'free riders'. Instead, individual tourism businesses promoted themselves discreetly with no overall co-ordination or message;
- There having long been a high level of public sector involvement in the tourism sector both as direct providers of tourism product and facilities and as promoters of their areas.

In October 2008, there was a change in emphasis of Yorkshire Forward's intervention in the tourism sector and a significant increase in funding with the approval a £30 million Regional Tourism Programme budget over three years to grow the value of tourism in the region by 5% annually. This decision followed an intensive period of Yorkshire Forward examining its

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<sup>1</sup> *Yorkshire and Humber Tourism Study*, KPMG, June 2002

<sup>2</sup> *Marketing the Region Through Tourism and Major Events, Policy Product Range*, Yorkshire Forward January 2008

<sup>3</sup> Over the course of its intervention, Yorkshire Forward, along with other RDAs began to refer to tourism as the visitor economy in an attempt to better describe the full extent, impact and economic importance of the sector.

<sup>4</sup> *Marketing the Region Through Tourism and Major Events, Policy Product Range*, Yorkshire Forward January 2008

<sup>5</sup> *Marketing the Region Through Tourism and Major Events, Policy Product Range*, Yorkshire Forward January 2008

own achievements in supporting the tourism sector, consulting others on their opinions, and subsequently being clearer about strategy, roles and expectations.

Yorkshire Forward's motivation for investing in tourism is probably best summarised by the aim, target and extract that follows from the Visitor Economy Strategy<sup>6</sup>:

**Strategic aim:** *"To increase the value of tourism to the regional economy through quality and sustainable growth based on the assets and opportunities of this region and to use tourism to modernise the regional image of Yorkshire and Humber."*

**Headline target** *"To grow the value of tourism in Yorkshire and Humber by 5% annually to 2013"*.

*"More than this though, visitors add to the richness of this region. Our great places, our environment, our cultural heritage and our sense of Yorkshire pride are all enhanced because they attract visitors to our region. Tourism adds to our quality of life and makes the region an attractive place to live, work and do business. Tourism promotion is one way through which we showcase the region nationally and internationally and tell the world what the region is like and what we have to offer. This can help to counter preconceptions and positively sell our region."*

## 2. Approaches Adopted

Yorkshire Forward's intervention in the tourism sector began with the Government's £2.5 million Business Recovery fund (which was co-ordinated by Yorkshire Forward) to address the impacts of FMD, the £4 million Single Pot Rural Economic Recovery Plan and 'Britain's Biggest Break'<sup>7</sup>, a £2.5 million TV advertising campaign that ran from Sept 2001 to March 2002<sup>8</sup>. The latter featured famous Yorkshire faces (Sean Bean; Mel B; Darren Gough; Alan Titchmarsh; Brian Turner) and was led directly by Yorkshire Forward to promote the County in the throes of FMD. It was the first of its kind, a regional advertising campaign of the type that is now familiar but that had not been tried at the time. As a direct result of the campaign it is estimated that the region attracted an extra 57,000 visitors generating an additional £18 million for the regional economy<sup>9</sup>.

By 2002, Ministers had signalled their intentions that the RDAs would in future provide strategic direction and leadership for tourism at regional level. In preparation, Yorkshire Forward produced 'Tourism: A Strategic Agenda for Yorkshire and Humber' as a consultation document and followed with 'Tourism: Yorkshire and Humber Tourism Action Plan', ratified by Yorkshire Forward's Board in September 2002.

This Action Plan was intended as a plan for an 18 month period during which new key roles, delivery arrangements and leadership for the tourism sector would be established, whilst also addressing issues with business networks and support structures; tourism

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<sup>6</sup> *Visitor Economy Strategy*, Yorkshire Forward 2008

<sup>7</sup> [www.YouTube.com](http://www.YouTube.com)

<sup>8</sup> *Yorkshire and Humber Tourism Study*, KPMG, June 2002

<sup>9</sup> *Yorkshire and Humber Tourism Study*, KPMG, June 2002

infrastructure, notably Tourism Information Centres (TICs); market intelligence; regional, sub regional and local marketing; skills; links to renaissance activity; environmental quality and accessibility. In the event, Yorkshire Forward and partners became focused over the next couple of years in the first of these issues, trying to drive change in tourism support structures.

This work began with consultancy research ('Roles and Responsibilities in Tourism Support and Promotion in the Yorkshire and Humber Region') by Travel Research International in 2003. The report's findings, whilst basically sound, were not made with sufficient conviction nor with real appreciation of what was achievable given the prevalent political context. The recommended roles and responsibilities, which, with the exception of Yorkshire Forward, remain relevant today, were that:

- Yorkshire Forward would meet its responsibilities as strategic lead, providing the policy framework and ongoing funding;
- Yorkshire Tourist Board would be restructured, to be responsible for marketing the region, managing the Yorkshire brand, and research and intelligence, but that it not take the lead with businesses; and
- Destination Management Organisations (DMOs) be established at sub regional level as membership organisations responsible for product development and industry support.

Yorkshire Forward, supported by a Change Management Group of partners, began the process of implementing these recommendations, by modernising the governance of Yorkshire Tourist Board and by working with local authorities and businesses on the creation and funding of the sub regional (i.e. Humber; North Yorkshire; South Yorkshire; and West Yorkshire) DMOs. However, it quickly became apparent that a single North Yorkshire DMO was not achievable given the different preferences and requirements of key local partners. Thus three DMOs were developed, based on the existing First Stop York and two new bodies focusing on the North York Moors and Coast and the Yorkshire Dales and Harrogate.

A parallel piece of work to modernise the region's Tourism Information Centres into a hub and spoke network<sup>10</sup> also became entangled in the structural change process and was halted.

During this time, Yorkshire Forward supported a number of projects working directly with the tourism sector. These included: the North York Moors Sustainable Tourism Project; the hosting of Royal Ascot at York; and working with the Yorkshire Dales National Park on accessibility and a Cycle Tourism Strategy.

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<sup>10</sup> *Yorkshire and Humber Tourism Information Provision Strategy*, Team, 2003

### **Case Study: The North York Moors Sustainable Tourism Project**

This project was conceived as part of the North York Moors National Park's reaction to the Foot and Mouth crisis of 2001 and was accepted by funding bodies, ERDF and Yorkshire Forward as a pilot project, seeking to demonstrate that investment in the environment would create jobs for the economy. Yorkshire Forward also wanted to learn lessons from the project for the delivery of similar interventions.

The project's initial business plan identified a large number of varied activities categorised as: sustainable infrastructure; enhancing existing assets; and promoting sustainable tourism. The project achieved its outputs and outcomes, the latter being demonstrated by increases in visitor spend, tourism employment and visitor numbers. The project also facilitated better partnership working amongst public sector bodies, a better understanding of sustainable rural tourism; and a better knowledge and relationship with the private sector tourism industry across the North York Moors.

However, it also demonstrated that outputs and outcomes from this type of activity can take some time to achieve; there are challenges of working with small remote rural businesses and the constraints of the rural employment market.

### **Case Study: Bringing Royal Ascot to York in 2005**

This was one of the first examples of the RDA supporting a major event. Forced to relocate because of redevelopment works at Ascot, the event in York was hugely successful in terms of the numbers attending and the impact on the economy and perception of the region. Anecdotal evidence abounded that visitors from the south were amazed at how easy and quick it was to get to York.

Yorkshire Forward invested in an integrated tourism campaign around the race meeting. Subsequent evaluation found that 224,000 visits were made to the race meeting, 154,000 of these by visitors to the city, generating 126,000 visitor nights. Total additional spending was £28 million and 99% of visitors said they would return to York.



At the end of 2005, a new 'Strategic Framework for the Visitor Economy' was published by Yorkshire Forward, again following consultation. This document began to focus intervention much more clearly around sustainability; innovation; quality; business development and skills; intelligence; visitor information; and marketing. Most importantly though, the Framework introduced a headline target to "increase the value of tourism earnings in Yorkshire and Humber by 5% per annum". This target, which still remains a requirement of Welcome to Yorkshire, has proved the single most unifying factor for the tourism sector across the region. The target provided absolute clarity about the purpose of intervention and it was embraced wholeheartedly by regional partners. The target underlined the economic importance of the sector and focused on value rather than volume, better reflecting economic aims and principles of sustainable tourism than a visitor numbers based target would have done.

Over the next couple of years, work continued to deliver the Strategic Framework, develop the tourism sector support structures across the region, and support the regional marketing of Yorkshire Tourist Board. This was articulated in their regional tourism marketing plan from 2006, 'Bold Vision, Bright Future' and focused on the 'Make Yorkshire Yours' campaigns<sup>11</sup>. However over this period, achieving real impact in the visitor economy was hampered by the ongoing structural change process, which whilst relatively successful in some areas, was struggling with small 'p' politics, leadership and processes in others. Successes such as the Regional Destination Management System were not guaranteed.

#### **Case Study: the Regional Destination Management System (DMS)**

One project that delivered benefit both to the sector as a whole and the way in which the tourism support structures operated was the Regional DMS project. This originally grew out of a crisis with a supplier of destination management systems which left various parts of Yorkshire and Humber, including Scarborough, without this important tourism marketing software.

A destination management system is software that brings together product information with communication channels, such as websites, tourism information centres and points, and enables on-line booking of that product. At the beginning of the Regional DMS project, the region used a number of different such systems and thus product data could not be shared between bodies (e.g. between local partners and Yorkshire Tourist Board) and had instead to be collected from businesses numerous different times.

The DMS project brought the region together, led by Yorkshire Forward, to define and procure a region wide system that was subsequently used by the Yorkshire Tourist Board, the Tourism Partnerships, local authorities, tourism information centres, VisitBritain and most crucially, the businesses. The project was important because it established a way of the region working together for the first time for mutual benefit, reducing duplication, improving efficiency and providing a better service and benefits to the industry. This joint working effectively set the scene for what was to come.

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<sup>11</sup> [www.YouTube.com](http://www.YouTube.com)

Another ongoing challenge for the Partnerships was understanding the distinction between structure of an organisation and a consumer facing brand. Historically, a structure was developed and then the promotional brand was developed to reflect this structure and its boundaries. This was another hindrance in North Yorkshire where Yorkshire Forward's position that a North Yorkshire structure could promote a series of constituent consumer facing brands never gained traction. In Hull and East Riding, partners successfully separated structure and brand, so that Visit Hull and East Yorkshire promoted Bridlington, Real Yorkshire and subsequently the Wolds.

One further development in the mid 2000s was the emergence of the Northern Way, which included 'Market the North to the World' as one of its ten workstreams. Its Growth Strategy<sup>12</sup> found that the North would be better served by working jointly to implement a "major, multi-faceted and long term campaign to better sell the area" targeted particularly at overseas markets and including elements focused on attracting investors, entrepreneurs and tourists. It also included a 'Welcome to the North' programme to use high profile public art to generate public and tourist interest, raise and enhance perceptions and add to the cultural offer. The joint northern promotion didn't really happen the way that had been planned, with individual regions (and localities within them) reluctant to forego their own identities and promotional programmes. The work did however foreshadow approaches that would re-emerge at a Yorkshire level.

It is also interesting to note the position of tourism within the Regional Economic Strategy (RES) more broadly as this was reviewed during 2005/6. The first RES in 2000 had said little about the visitor economy apart from identifying the need for a regional tourism strategy and website. The 2006 RES<sup>13</sup> did not have an extensive section singling out the visitor economy, but did seek to integrate support for it across the Strategy. It included actions on promotional campaigns and an annex showing how objectives as diverse as improving the environment, raising skills, enhancing transport business support and urban and rural renaissance programmes should support the visitor economy. What was always a topic of debate strategically was whether the tourism sector should be identified as a 'key sector' or 'cluster' in a way that other, often similarly sized parts of the economy were, or whether it was fundamentally something different. On balance, whilst aspects of the sector support approach did apply, the latter case was stronger. And economic strategies reflected this. Typically the RES stressed the importance of tourism and made clear that it fell within its economic remit, however the detail of the approach was laid out in supporting plans.

This chapter of Yorkshire and Humber's approach to the visitor economy effectively came to a close with the internal 'Seven Year Review' instigated by the new Yorkshire Forward Chief Executive, which recommended that Yorkshire Forward needed to "Enhance our approach to regional marketing"<sup>14</sup>. In April 2007 a Yorkshire Forward Board Task and Finish Group was established as a direct result of this review to look at:

- Whether tourism structures at both a regional and sub-regional level were fit for purpose, and could any lessons be learnt?

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<sup>12</sup> Moving Forward: The Northern Way First Growth Strategy, Northern Way Steering Group, 2004

<sup>13</sup> The Regional Economic Strategy for Yorkshire and Humber 2006-2015, Yorkshire Forward, 2006

<sup>14</sup> 7 Year Review, Yorkshire Forward, 2007

- Was there a need to incentivise the local authorities to work together on marketing?
- How far YTB was providing value for money and the level of payment for its role?
- Should the region be focusing more on activity rather than place? (Given that visitor motivation is increasingly about experience rather than destination).
- Whether Yorkshire Forward was investing enough into what was a £5 billion industry in the region, and how could the impact of investment be evidenced long term?

Evidence suggested that Yorkshire and Humber was lagging behind its competitors and that the stereotypical image of the region prevailed, despite massive investment improving many towns and cities. Furthermore, the structural change process that Yorkshire Forward had been driving amongst tourism support bodies was beginning to flag. And so the Task and Finish Group met over a period of 8 months, reviewing evidence, consulting with partners, benchmarking the tourism support structures receiving Yorkshire Forward investment; learning from other RDAs, and indeed other countries; and considering possible alternative delivery arrangements, before coming up with conclusions in the Autumn of 2007, as follows:

- Yorkshire Forward had become too involved in the detail of the management and delivery of Yorkshire Tourist Board and the Tourism Partnerships at the expense of its strategic lead role;
- Yorkshire Forward had not been clear about what it was buying with and expecting from investment;
- The process of structural change in tourism had achieved different levels of success across the region;
- The tourism sector in the region preferred to see the existing delivery arrangements refined and improved rather than wholesale upheaval; and
- Yorkshire Forward was investing less annually than typically was the case elsewhere, even in comparison to those regions where tourism was less economically important.

In parallel to the Task and Finish Group, Yorkshire Forward was beginning to look more closely at the benefits to the region from hosting major events. This had really begun with Royal Ascot at York, but in 2007, Yorkshire Forward brought the Indian International Film Awards (IIFA) to Sheffield. A Major Events Strategy for the region had been produced in 2005<sup>15</sup> identifying opportunities for hosting events around the five strategic event hubs of the region's major cities and focusing on sports; arts and culture; meetings, incentive travel, exhibitions and entertainment. These were as follows:

- Sheffield – Sport
- West Yorkshire – Cultural Diversity
- North Yorkshire – Outdoor Activities
- The Coast – Maritime Activities
- Leeds – Business and Entertainment

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<sup>15</sup> A Major Events Strategy for Yorkshire, MJA Matchpoint, August 2005

This work had originated in the region's support for the London 2012 bid, as recognised by Martin Havenhand, the then Chief Executive of Yorkshire Forward, in the foreword to the Major Events Strategy:

*“Our work in this region to support London's bid led us to look also at other major events. It caused us to consider how Yorkshire and Humber was placed as a potential destination for major events”.*

### Case Study: Dalby Forest Visitor Centre

Dalby Forest, near Pickering has been completely transformed in recent years, to create a significant visitor attraction in the heart of the North York Moors National Park, offering world class mountain biking facilities.

Yorkshire Forward invested over £1 million in a new visitor centre at Low Dalby, an exemplar of sustainable building practices. The centre incorporates wind turbine, solar panels, rainwater harvesting and a wood fuel boiler, and was announced as the winner of the prestigious Prime Minister's Better Public Building Award at the British Construction Industry Awards 2007. The visitor centre is one key element of the transformation of Dalby Forest which also included 55kms of bespoke mountain bike trails and facilities (bike hire, shop and cafe), craft workshops and offices.

By 2009, Dalby's reputation as a centre of mountain biking excellence led Yorkshire Forward to submit a bid to first British Cycling and then the UCI (cycling's international federation) to host the Mountain Bike Cross Country World Cup, 2010-2012. The success of this bid meant further Yorkshire Forward investment in a 6.5km world class mountain bike trail, highly praised by competitors, and support for hosting the event, subsequently voted as the best stage in the 2010 World Cup.

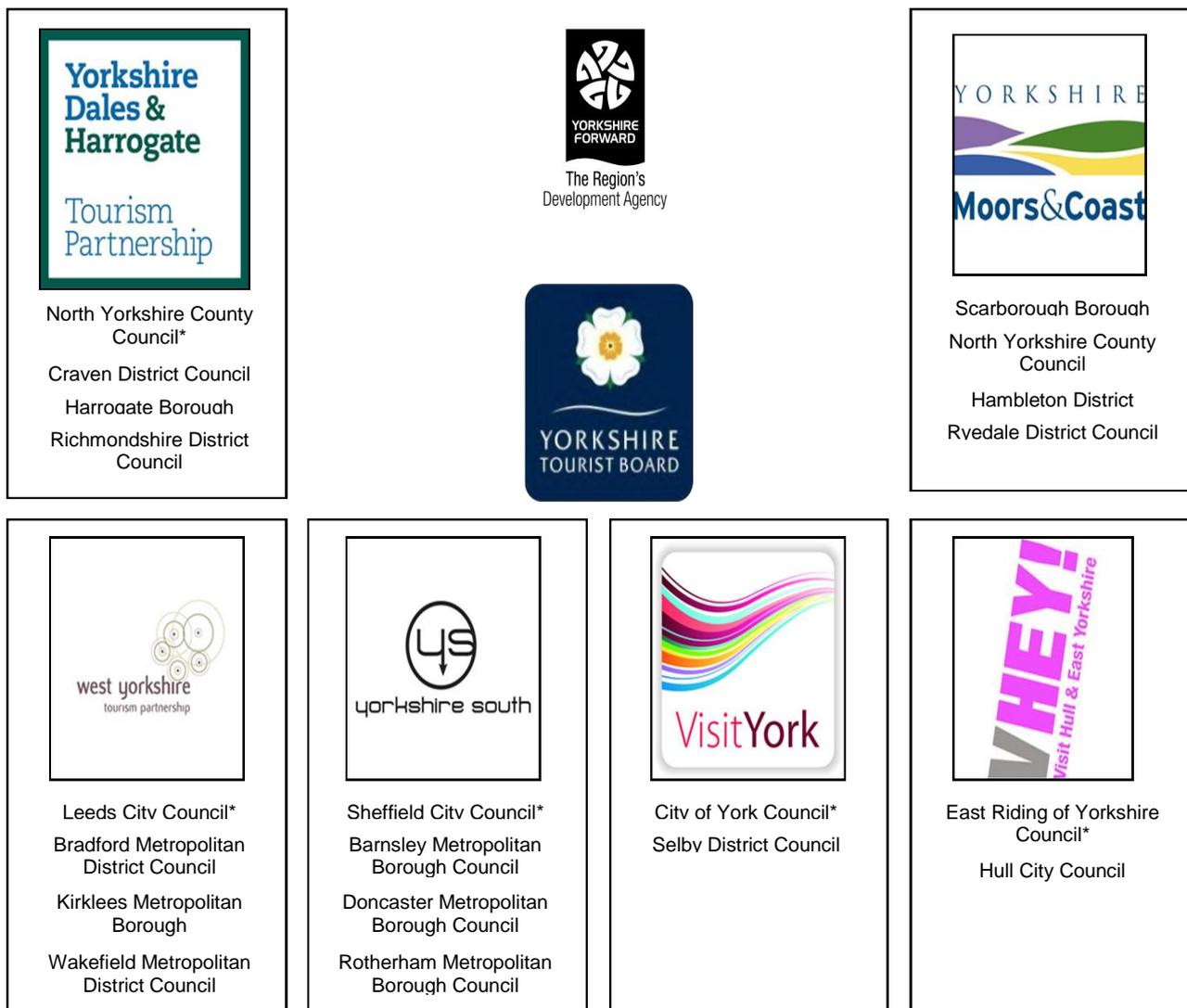


The support for the 2012 bid, ultimately resulted in 2007's 'Yorkshire Gold' Strategy<sup>16</sup> for how Yorkshire and Humber could make the most of the 2012 Olympic Games and Paralympic Games in London. Yorkshire Gold identified five strands of activity ('Golden Opportunities') focused on sport; community; culture; tourism and business, with each strand being led by a regional body. Until its demise, Yorkshire Culture co-ordinated the Regional Olympic Committee, utilising resources from Yorkshire Forward.

The first Yorkshire Gold strategy included a section on profile and tourism potential which probably summed up much of the emerging thinking and the approach that was to follow:

*"This region will work with imagination and vigour in the way it raises Yorkshire's profile, enhances perceptions of the region and achieves lasting tourism benefits. Positioning the region as a place where exciting sports and cultural activity happens will bolster awareness of the region, and its reputation in the UK and abroad".*

Returning to structures, the logos map below illustrates the tourism support structure across the region by the beginning of 2008:



<sup>16</sup> , Yorkshire Gold Strategy, produced by Yorkshire Futures in 2006 and updated in December 2008

Towards the end of the Task and Finish Group process, the Task and Finish Group set a challenge for Yorkshire Tourist Board; to lead the Tourism Partnerships in a programme of improvements including taking a fresh look at regional tourism promotion, that, if successful, could ultimately lead to increased investment from Yorkshire Forward in the sector.

Yorkshire Tourist Board, now lead by a new Chair, Claire Morrow, took on this challenge and led a change management process over the next 12 months extensively involving the Tourism Partnerships and local authority partners. Through the first half of 2008 Yorkshire Forward monitored progress with this change management process, deeming it sufficiently successful to proceed with a much larger Single Pot Funding application for the tourism sector than ever before.

As part of the change management process, a new Visitor Economy Strategy was collectively developed and published in mid 2008, effectively specifying what Yorkshire Forward was prepared to invest in. This new strategy followed the success of London winning the 2012 Olympic and Paralympic Games and the publication of a new national strategy to make the most of these Games 'Winning: A Tourism Strategy for 2012 and Beyond'<sup>17</sup>. The Visitor Economy Strategy also drew heavily on the 'Policy Product Range' for Marketing the Region that Yorkshire Forward had been developing internally. The Visitor Economy Strategy (VES) included the following priorities and target:

<b>Theme Regional priority</b>	<b>Strategic Objective</b>	<b>Regional target</b>
<b>Strategy</b>		
<b>Strategy and planning</b>	<i>To provide strategic direction for growth of the visitor economy behind which the tourism sector can align and supporting this a co-ordinated approach to planning delivery.</i>	<i>Annual production of integrated regional and local delivery plans by the partners in the network from 2009 onwards that complement and support the regional strategic objectives.</i>
<b>Research and intelligence</b>	<i>To improve regional understanding of the visitor economy and develop a better evidence base.</i>	<i>Regional visitor survey results reported annually from April 2009 with update on regional tourism growth target position.</i>
<b>Innovation</b>		
<b>Innovation</b>	<i>To develop the region's tourism offer of the future based on identified strengths and opportunities.</i>	<i>To achieve ongoing innovation in all areas of the visitor economy with the development of one major innovative project by 2012.</i>
<b>Marketing</b>		
<b>Place – great destinations</b>	<i>To ensure that the development of great places in our region maximises the potential for growth of the visitor economy.</i>	<i>To regionally endorse the Partners for England Destination Charter and achieve full regional sign up to its principles by 2010.</i>
<b>Product – quality</b>	<i>To raise the quality of the tourism offer in the region.</i>	<i>To increase engagement with accreditation mechanisms across the sector to improve the exploitation of ICT by tourism businesses.</i>
<b>People – customer service</b>	<i>To bring tourism and skills tourism partners to instil an ambitious, enterprising learning culture in the tourism sector where customer service is a top priority.</i>	<i>To achieve improvements in the level of customer service apparent within the visitor economy of Yorkshire and Humber as measured by the regional visitor survey.</i>
<b>Promotion – image and branding</b>	<i>To promote a positive image of the region in a contemporary way that inspires visitors to experience Yorkshire.</i>	<i>To achieve a co-ordinated approach to tourism branding and promotion by 2009 that delivers increasing visitor spend and contributes to modernising the regional image.</i>

<sup>17</sup> *Winning: A Tourism Strategy for 2012 and Beyond*, Department for Culture, Media and Sport, 2007

These strategic objectives were translated into operational objectives and deliverables that were re-cut into the six projects of the Regional Tourism Programme.

**Project 1: Domestic leisure and group travel promotion** - promoting the region and its relevant constituent destinations or experiences to the core target market segments within the leisure domestic market and delivering against the VES promotion and branding target;

**Project 2: Branding, international leisure and business travel promotion** - high value and growth markets of the international leisure visitors and business travellers and delivering against the VES promotion and branding target;

**Project 3: Innovation, research and intelligence** - creating a forward looking approach and mentality within the region's tourism sector, by improving intelligence about the tourism sector and secondly by bringing information provision up to date for the 21<sup>st</sup> century and delivering against the VES innovation target;

**Project 4: Engagement and skills** - engaging on the visitor economy with the tourism sector and more widely with partners, stakeholders and the general public and delivering against the VES product and people targets;

**Project 5: Product development** - focusing on developing the tourism product in the region and delivering against the VES product and place targets;

**Project 6: Network operations** - supporting the network of tourism delivery partners (i.e. Yorkshire Tourist Board and the Tourism Partnerships) and delivering against the VES strategy and planning target.

These re-cut projects resulted in a mis-match between the VES and the Regional Tourism Programme, and to some extent severed the link between Yorkshire Forward's investment and the specification for delivery, i.e. the VES. However, at a time of much change, led by Yorkshire Tourist Board, it became practical to accept and subsequently try and manage this mismatch rather than challenge it.

Yorkshire Forward's Regional Tourism Programme, £30 million over three years of investment in the tourism sector in Yorkshire and Humber, was approved in October 2008, to be delivered by a network of Yorkshire Tourist Board and the Tourism Partnerships. To lead and co-ordinate this programme, Yorkshire Tourist Board re launched itself as Welcome to Yorkshire on 3 April 2009. It had responsibility for regional promotion and leading the Tourism Partnerships in delivering local engagement and accountability. This launch marked a real transformation in the level of ambition for the tourism industry in Yorkshire and Humber.

Welcome to Yorkshire's initial promotional activity included TV advertising and sponsorship, national press, cinemas, colour supplements, weekly and monthly national magazines, regional monthly magazines as well as London Underground and main line rail stations, with their "A long weekend in Yorkshire isn't long enough" campaign.

Welcome to Yorkshire data suggests that their 2009 campaign reached over 12 million people, equivalent to 70% of the ABC1 target market in the UK with each seeing the advert

5.4 times<sup>18</sup> and their 2010 campaign by 9.2 million people, or 52% of the ABC1 population with each seeing the advert at least 3.5 times<sup>19</sup>. The campaign went on to win the 'World's Leading Marketing Campaign' at the World Travel Awards in November 2010. The regional promotional website was re-launched as [www.yorkshire.com](http://www.yorkshire.com) attracting 1.3 million unique visits from April to December 2009<sup>20</sup>, double the levels in the previous year, with [www.yorkshire.com](http://www.yorkshire.com) subsequently winning Travelmole's Best Tourist Board website 2009 and 2010 and 'Best Use of Video' award.

For the first time, regional promotion made use of Twitter and Welcome to Yorkshire launched an iPhone App. International promotion also increased, with targeted campaigns in key European markets delivered in conjunction with partners and the website translated into seven languages. Welcome to Yorkshire also sought to engage with key stakeholders in the region, initiating a Yorkshire Patrons scheme and corporate partners scheme Y30, as well as undertaking a rigorous PR campaign, using Chief Executive Gary Verity as the 'face' of tourism in the region. In its first year, Welcome to Yorkshire issued 76 press releases and achieved a total equivalent advertising value for their media coverage of £7.5 million (April to September 2009), and an editorial value approximately £22.5 million, compared to £900,000 for media coverage for the same period the previous year<sup>21</sup>.

Welcome to Yorkshire and the Tourism Partnerships implemented a common approach to membership, a 'partner' scheme that was consistently promoted by a series of Business Engagement Executives located in the Tourism Partnerships across the region. This resulted in 30% increase in partners in the first year<sup>22</sup>. Welcome to Yorkshire and partners also worked together on a co-ordinated approach to exhibitions, beginning with a Yorkshire stand at World Travel Market in 2009. Furthermore, a more co-ordinated, sales driven approach to business tourism was championed particularly by Welcome to Yorkshire working through the region's conference desks. Finally, Welcome to Yorkshire became responsible for investment through the Regional Tourism Programme at a local level by the Tourism Partnerships and led planning and management of this network approach to delivery as well as reporting back to Yorkshire Forward.

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<sup>18</sup> *Business Plan 2010-2011*, Welcome to Yorkshire, January 2010

<sup>19</sup> *Business Plan 2011-2012*, Welcome to Yorkshire, April 2011

<sup>20</sup> Welcome to Yorkshire

<sup>21</sup> *Business Plan 2010-2011*, Welcome to Yorkshire, January 2010

<sup>22</sup> *Business Plan 2010-2011*, Welcome to Yorkshire, January 2010

## Case Study: Bringing the 'Clipper' Round the World Yacht Race to Hull & Humber

Yorkshire Forward invested over four years in the Clipper Round the World Yacht Race; this meant sponsoring the 'Hull & Humber' yacht to enter the 07-08 and 09-10 races and the Humber hosting the 09-10 Race Start and Finish. Yorkshire Forward managed this investment directly, with three objectives; to increase trade, to increase tourism, and to raise the profile of the region.

In total, 200,000 people attended the Race Start and Finish events in Hull showcasing the City to the world and its ability to stage a world event. Businesses around Hull Marina reported a higher than average footfall during both events, and local people deemed the events as "fantastic" for the city. The events generated up to **£5.1 million** gross expenditure by visitors and the 09-10 Race Start weekend was commended by judges at the recent Event UK Awards and White Rose Awards ceremonies.

Yorkshire Forward worked with partners United Kingdom Trade and Investment, Hull and Humber Chamber of Commerce and Welcome to Yorkshire to organise four trade missions to Cape Town, Qingdao, New York and Nova Scotia. Trade outputs associated with these missions will take time to be realised and the Hull and Humber Chamber of Commerce will continue to report to Yorkshire Forward on trade outputs achieved as a result of the missions until December 2011. However, the Chamber has reported that **£0.5 million** of trade has already been realised, and this is expected to rise to over **£1 million** over the next few months.

The local, national and international media featured the Hull & Humber yacht over the course of the 09-10 race. This included positive coverage of the city, and the trade and tourism benefits the race had generated. The 'Hull & Humber' yacht generated the highest amount of coverage of any of the yachts in the 09-10 race, with a Advertising Value Equivalent (AVE) of over **£6 million** reaching a global audience of over **450 million** people.



By mid 2009, the extent of the change in delivery ambition being seen through Welcome to Yorkshire prompted Yorkshire Forward to end its in house development work on a separate major events structure and agree instead to transfer the delivery of events to Welcome to Yorkshire. This transfer consisted of the delivery of several events already secured by Yorkshire Forward:

- BBC Sports Personality of the Year, 2009
- World Snooker Championships, 2010
- UCI Mountain Bike Cross Country World Cup 2010, 2011, 2012
- World Curry Festival, 2010
- World Short Track Speed Skating Championships 2011
- Senior European Fencing Championships 2011
- European Figure Skating Championships 2012

The transfer also included a development fund to secure and support further events at Welcome to Yorkshire's discretion. In 2009, Yorkshire Forward also asked Welcome to Yorkshire to continue to co-ordinate the region's 2012 structures and activities, with Gary Verity becoming Chair of the Regional Olympic Committee.

Over the course of the 2010, and in 2011, as Yorkshire Forward entered its final year of investment in the tourism sector in the region, the network approach to delivery had become more strained. The Tourism Partnerships in West Yorkshire, South Yorkshire and North Yorkshire have collapsed as independent bodies, with Welcome to Yorkshire now delivering local activities directly in these areas, to local Advisory Boards. There are a number of different reasons for this but the most significant seems to have been the relative strength of Welcome to Yorkshire as an organisation, compared to the Partnerships, some of which were just finding their feet at the end of 2008. Visit York continues as a successful independent body, and Visit Hull and East Yorkshire remains but has been subsumed within East Riding of Yorkshire Council to provide it with some financial sustainability. The relationships between these two partnerships and Welcome to Yorkshire as well as with local partners generally will be tested as the Coalition Government's localism agenda promotes leadership at a local level (not regional) with national support.

Throughout, Yorkshire Forward continued work directly on the development and delivery of discreet projects. Probably the most high profile of these in recent years has been Yorkshire Forward's investment to bring the Clipper Round the World Yacht Race to the region. The largest was the joint investment with Harrogate Borough Council in the redevelopment of Harrogate International Centre. Other projects include: redevelopment of the Danby Moors Centre with the North York Moors National Park; Wentworth Castle refurbishments and visitor facilities; redeveloping York Visitor Information Centre; and South Humber Bank Heritage Tourism developments.

### **Case Study: Redevelopment of Harrogate International Centre**

Yorkshire Forward is providing £6.5 million capital funding towards the £13 million redevelopment of Harrogate International Centre (HIC), work is due to be complete by October 2011.

The project will reduce the risk of HIC losing existing business while enhancing the ability to generate new business and consolidate Harrogate's position in the UK exhibition market. It will also provide a more significant asset to underpin the visitor economy in Harrogate and the wider economic prosperity of the town. The redevelopment of HIC will also be a catalyst in the improvement of quality hotel accommodation in Harrogate.

The project involves development of two new halls over two levels adding a further 3,400 sq. m of quality exhibition space to the existing 16,500 sq m. This will enable HIC to accommodate a broader range of exhibitions. HIC will also benefit from a new focal entrance, better connectivity into the new and existing halls, improved hall circulation, enhanced building security, better servicing and access.

The importance of business tourism and indeed HIC to the local economy is clear. In 2009, business visitors to Harrogate generated more than £230 million, ranking the district as the second highest grossing business tourism centre in the region behind Leeds. Figures published by HIC in May 2011 demonstrate the importance of the facility; the Centre achieved £180 million for the local economy in financial year 2010/11. Furthermore, over 24,000 jobs are supported by business and leisure tourism in the district. The redevelopment aims to increase business visitor spend attributable to HIC by £4.2 million per year. These economic outcomes would give a cost:benefit ratio on the £13 million public sector investment (Yorkshire Forward and Harrogate Borough Council) of 1:6.4 over 20 years and 1:8 over 25 years.

### **Case Study: A New Gallery at the National Media Museum in Bradford**

The creation of a bespoke gallery at the National Media Museum dedicated to the social impact of the internet is due for completion in March 2012. 'Life Online' is the first of its kind in the world and will feature a permanent gallery as well as temporary exhibition space and associated showcase and mentoring opportunities for local digital and new media companies and community learning facilities and programmes. This link between a visitor attraction and local business and residents, to ensure that the local community benefits from the investment as well as the Museum's half million plus visitors is particularly exciting. Yorkshire Forward is investing £1 million in the project together with DCMS, NMSI and The Wolfson Foundation.



### 3. Resources, Results and Outcomes

The precise level of Yorkshire Forward’s investment in the tourism sector over 10 years, from 2001-2002 and FMD to 2011-12, is difficult to quantify, given the cross cutting nature of many visitor economy projects and the inclusion of these in a number of different policy areas across Yorkshire Forward. Research undertaken in 2009<sup>23</sup> indicated that across all its policy areas, Yorkshire invested an estimated £60 million in the visitor economy from 2005-2009 on cultural attractions, events and public realm projects. This is almost one third of all public investment in such projects over the period, and one fifth of total investment in such projects over the period:

Investment 2005-2009		£
Yorkshire Forward – investment across all policy areas	Cultural attractions	27m
	Cultural attractions, events, public realm	60m
Total Public sector	Cultural attractions, events, public realm	167m
Total Investment	Cultural attractions, events, public realm	306m

Yorkshire Forward investment directly through the relevant policy areas of visitor economy and marketing the region Policy Product Ranges, has been £90.6 million from 2000 to the end of March 2011, with a further £16 million forecast spend for 2011-2012.

So what has been the result of this investment for the visitor economy? Evaluation activity has been undertaken on many of the projects in which Yorkshire Forward has invested, invariably showing increased visitor numbers and spend as a result of the investment as well as job creation, business support and match funding outputs. However, this does not tell us about the impact on the region’s visitor economy as a whole. In 2009 Yorkshire Forward commissioned research into the long term future of the visitor economy in Yorkshire and Humber. This included a market and product analysis, and from this we know the **past performance of the visitor economy in the region**<sup>24</sup>:

- Growth was coming only from the day visitor market 1999-2007;
- The staying visitor market was not growing, with no change in the number of nights spent in the region from 1990-2007;
- There had been less growth in overseas visitors than had been the case in other regions of the UK, and again there was no change in the number of nights spent by overseas visitors to Yorkshire and Humber 1990-2007;
- Yorkshire and Humber’s share of the UK domestic staying market was growing;
- The region was not earning as much from its visitors as other parts of England, because of the types of visitors being attracted, e.g. those visiting friends and family;
- North Yorkshire’s visitor economy, characterised by older, traditional, staying visitors was not growing at all.

<sup>23</sup> *Yorkshire and Humber Tourism Investment, Report for Yorkshire Forward and Welcome to Yorkshire, Blue Sail, August 2009*

<sup>24</sup> *Yorkshire and Humber Tourism Future, Mary Lynch Associates, July 2009*

Set against this background of Yorkshire and Humber losing out to competitors, **visitor survey research concluded that by 2010:**<sup>25</sup>

- Staying visitors as a proportion of total visitors was increasing;
- Over a quarter of visitors were first time visitors to the locality/area, again this had been increasing;
- Overseas visitors represented 5% of the total, with York attracting the highest proportion of overseas visitors, 9%;
- More visitors were involved in activities, particularly in parts of North Yorkshire;
- Levels of visitor spend were increasing, particularly on accommodation;
- 71% of all visitors were likely to return within two years, an increase on the previous year;
- 88% of visitors were very likely to recommend Yorkshire and Humber, again up on 2009.

Drawing on this visitor survey, Yorkshire Forward commissioned a Tourism Economic Impact Model to provide far more accurate measures of the value of the tourism at regional and local level and track changes over time<sup>26</sup>.

**Key findings from the model for 2009 are:**

- There were over 216 million visits in 2009 to the region, an increase of 20 million visits from 2008;
- Visitors to Yorkshire and Humber in 2009 spent £6.34 billion, an increase of almost £400 million from the previous year;
- This equated to a GVA impact of £3.22 billion;
- 164,907 full time equivalent jobs were supported by the visitor economy, directly and indirectly. This is 3,000 more than in 2008;
- Visitor spend was increasing in North Yorkshire.

The evaluation<sup>27</sup> of the Regional Tourism Programme, shows that YF investment in 2009/10 through Welcome to Yorkshire yielded a net return on investment (ROI) figure of **£13.57 for every £1** invested, well above the average that would be expected for this kind of RDA investment. Trend data also indicates a 10% increase in tourism spend over the year, well above the England average of 4% and the previous Yorkshire average of 2%. However, it is in terms of Strategic Added Value that the impact of the Regional Tourism Programme and Welcome to Yorkshire can most clearly be seen.

In this regard, the evaluation concluded that it provided:

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<sup>25</sup> *Yorkshire and Humber Regional Visitor Survey 2009/2010*, QA Research and The Tourism Network, July 2010

<sup>26</sup> *Economic Impact of the Visitor Economy in Yorkshire and Humber 2009*, Place First, November 2010

<sup>27</sup> *Evaluation of Yorkshire forward's Regional Tourism Programme Phase 3 & 4 Final Report*, SQW and the Tourism Company, October 2010

*“leadership, ambition, co-ordination and promotion, resulting in a more cohesive tourism sector and offer and bringing wide benefits to the region”.*

This leadership has come at the expense of four of the Tourism Partnerships, who for different reasons were not able to hold their own and deliver as part of the Regional Tourism Programme for Welcome to Yorkshire. Indeed, the relative strength and the high profile of Welcome to Yorkshire and its Chief Executive, both within the region and with national partners, has not been universally popular. There has been a feeling amongst some that Welcome to Yorkshire’s access to resources from Yorkshire Forward and its approach to investing these resources has meant a change from the network approach and partnership working, to an overarching and firm leadership approach. However, thus far, the results achieved by Welcome to Yorkshire have been sufficient to counterbalance this feeling amongst partners.

The promotional activity of Welcome to Yorkshire continued during 2011-2012, as Yorkshire Forward entered its final year of funding, but the context is now very different. Yorkshire Forward, along with the other RDAs is being abolished, and with it the disappearance of the strategic lead role for tourism in the region. VisitEngland is following its remit of working with the emerging and developing Local Enterprise Partnerships. The Coalition Government has published its new Tourism Policy, clearly stating its belief that tourism should be led locally and supported nationally. All of this leaves Welcome to Yorkshire with the challenge of generating sufficient income from whatever source it can to sustain its activities. Its aim of doubling its membership base – as set out at their annual conference in April 2011 – is one route towards plugging this funding gap, as well as widening its partnership and traction.

## 4. Insights and Lessons Learned

Some of the key headlines to come out of Yorkshire Forward's strategic and partnership roles and its intervention in the tourism sector over the last ten years are:

- a) **Tourism is a peculiarly political policy area.** In the main, local authorities do not invest strategically in tourism, nor do they commit extensive resources. However, Members are often disproportionately exercised about tourism related matters (e.g. Tourist Information Centres and leaflets) which can often mean that the right thing to do in theory is difficult to deliver in practice.
- b) Within many local authorities **tourism has been seen as a promotional activity rather than being about management of a destination** and as such providing and maintaining visitor facilities and services. This has been changing over recent years, particularly as a number of towns and cities have considered the visitor economy as part of their renaissance processes and awareness of destination management increases. Within Yorkshire Forward, the potential to exploit the link between renaissance and the visitor economy to achieve maximum benefit has not been fully exploited.
- c) The tourism sector is characterised by small businesses, a proportion of which are lifestyle businesses, and it is a sector which is used to receiving public sector support. This means that **driving change in this area is a slow process.** Working with those businesses that are willing and able to grow is one way of tackling this, but as promotional activity relies on the extent of the product available in an area, this approach can be difficult to stick to.
- d) The public sector, perhaps because of its geographic remit often tends to adopt a flawed **supply side approach to promotion**, i.e. selling what is in a particular area (e.g. based on district boundaries) rather than a consumer facing approach. Across Yorkshire and Humber this issue has been most obvious as brands have mirrored Tourism Partnership structures rather than packaged areas that visitors would recognise as destinations.
- e) **A good evidence base is crucial** – the traditional understanding of the visitor economy in Yorkshire and Humber is that it was dominated by North Yorkshire, in fact, Leeds, generates the most income from the visitor economy in the region. The challenge with this is that whilst the success of tourism in Leeds is important for the success of tourism in the region, in terms of the economy of the city, tourism is relatively less important than it is in the traditional North Yorkshire destinations.
- f) **The relationship between tourism strategy and economic strategy is complex** and easily confused. Tourism is a part of the economy and needs to be fully integrated with all strands of economic policy including; skills, innovation and enterprise. Tourism also clearly impacts on and is impacted by other elements of places and their quality of life. Links to the physical environment, transport and culture are vital too.
- g) **Setting the 5% growth in annual visitor spend target and sticking with it** was probably the most significant unifying factor that brought together the disparate tourism

support bodies across the region, as for the first time intervention was driven by the same goal. The fact this was a value target rather than a volume target also underlined the economic importance of tourism to the region.

- h)** In the last two years, Yorkshire Forward's **increased investment in support for the visitor economy has yielded real results**. The challenge now is to continue a legacy from this level of investment as the wider public sector funding and policy context changes completely.

## **Annex A: Experience Elsewhere and Regional Tourism Futures**

Given that tourism became a strategic responsibility of the RDAs in 2003, all have invested to a greater or lesser extent in the sector and all have instigated some form of structural reform amongst their tourism support bodies. This has varied between regions, with some adopting a direct delivery model and others sticking to the strategic lead role and outsourcing delivery, e.g. ONE North East chose to deliver tourism support directly through a tourism department as part of the RDA. Furthermore, individual RDA responses to tourism have been influenced by the degree to which there is a regional tourism offer or brand – in the case of Yorkshire and Humber, ‘Yorkshire’ is a strong consumer brand, deserved of regional promotion – whereas in the North West, ‘The Lake District’ and ‘Manchester’ would be more appropriate consumer brands and as such, the North West supported stronger local partnerships rather than a regional delivery body.

Throughout, the RDAs have met collectively, led by the South West RDA, to exchange information, experience and work together where appropriate, e.g. on national tourism ICT infrastructure and with VisitBritain initially and VisitEngland latterly. However the potential strength of this national co-operation was never fully realised as regions concentrated on their own priorities. Interestingly though, VisitEngland has adopted Yorkshire Forward’s original target of 5% growth in the visitor economy annually, in its Strategic Framework for Tourism. Latterly, Yorkshire Forward’s tourism investment has come under some scrutiny nationally, as investment has been maintained through 2011-2012 as the final year of a three year contract with Welcome to Yorkshire. This is beyond that of other regions whose RDAs supported tourism bodies up to when funding ended in March 2011.

At various points over the last few years, Yorkshire Forward has sought to learn from others, striking up a relationship with Visit Scotland and internationally with Visit Florida and the Disney Institute, the professional training arm of the Disney Corporation. These relationships have provided valuable comparative insights and informed strategy development and activity at various levels.

### **Regional Tourism in the Future**

The Coalition Government has clearly stated its intention in its recent Tourism Policy that it wishes to see tourism led locally and supported nationally. This leaves regional tourism bodies, such as Welcome to Yorkshire, with a challenge ahead, particularly given that RDA funding will be no more after March 2012. For the Government, local leadership is seen in terms of industry led partnerships – Destination Management Organisations (DMOs) - though not, as has been the case in many areas, supported by significant public monies. In Yorkshire and Humber the experience and achievements of the original Tourism Partnerships will be useful background to this, with, for example, VisitYork already performing much of the role of a DMO and Marketing Leeds, led by the City Council who also latterly led West Yorkshire tourism delivery within the Regional Tourism Programme, reforming itself to potentially take on some of this role for the City and the wider sub region.

This means that regional bodies such as Welcome to Yorkshire must strive to add value to what can be delivered and achieved locally. It is likely that this added value will be about continuing to promote the Yorkshire brand, though probably with a much smaller budget;

capitalising on the success of yorkshrie.com; being a Yorkshire voice of tourism both nationally and regional; and providing leadership for the sector based on sound intelligence. In order to deliver added value successfully, Welcome to Yorkshire will need to work in effective partnership in a way they have not had to previously given their healthy level of resources.

The risk for the future is that the benefits of, what seemed like the right approach to delivery of support for the tourism sector for most of the region – i.e. regional and local working together - will be lost. That combination has strengths because 'Yorkshire' is a strong consumer brand but the region is large and diverse. The changing policy context and squeeze on public sector investment will mean a fight to continue that approach, and the risk of losing much of the positive change achieved and the potential legacy from a decade of investment and partnership working in the sector.

## **Annex B: Further Information**

### **Key Documents:**

*Yorkshire and Humber Tourism Study*, KPMG, June 2002  
*Regional Economic Strategy 2003-2012*, Yorkshire Forward, 2003  
*Yorkshire and Humber Tourism Action Plan*, Yorkshire Forward, 2002  
*A New Tourism Delivery Structure for Yorkshire and the Humber*, Yorkshire Forward, 2003  
*Tourism: A Strategic Agenda for Yorkshire and Humber*, Yorkshire Forward, 2003  
*Roles and Responsibilities in Tourism Support and Promotion in the Yorkshire and Humber Region, Final Report for Yorkshire Forward*, Travel Research International, December 2003  
*Yorkshire and Humber Business Tourism Research Study*, Ernst & Young, December 2003  
*Yorkshire and Humber Tourism Information Provision Strategy*, Team, 2003  
*Developing Regional Level Policies for Sustainable Tourism in Yorkshire and Humber*, SQW and The Tourism Company, November 2004  
*A Major Events Strategy for Yorkshire, Final Report*, MJA Matchpoint, August 2005  
*A Strategic Framework for the Visitor Economy*, Yorkshire Forward, November 2005  
*Bold Vision Bright Future, The Tourism Marketing Strategy for Yorkshire and Humber 2006-2010*, Yorkshire Tourist Board, 2006  
*Winning: A Tourism Strategy for 2012 and Beyond*, DCMS, September 2007  
*Marketing the Region Through Tourism and Major Events Policy Product Range*, Yorkshire Forward, January 2008  
*Visitor Economy Strategy*, Yorkshire Forward, 2008  
*Yorkshire and Humber Tourism Future*, Mary Lynch Associates, July 2009  
*Yorkshire and Humber Tourism Investment*, Blue Sail, August 2009  
*England: A Strategic Framework for Tourism 2010-2020*, VisitEngland, March 2010  
*Yorkshire and Humber Regional Visitor Survey 2009/2010, Key Findings for Yorkshire Forward*, QA Research & The Tourism Network, July 2010  
*Evaluation of Yorkshire Forward's Regional Tourism Programme, Phase 3 & 4 Final Report*, SQW & The Tourism Company, October 2010  
*Economic Impact of the Visitor Economy in Yorkshire and Humber 2009*, Place First, November 2010  
*Government Tourism Policy*, DCMS, March 2011

### **Key Projects, Contractors and Dates (NB this is not an exhaustive list)**

*Sustainable Tourism Project (900652)*, North York Moors National Park, 2002-2005  
*EnglandNet (900653)*, Yorkshire Tourist Board, 2002-2005  
*YTB Business Plan Core Grant (900699)*, Yorkshire Tourist Board, 2003-2007  
*Regional Awareness Marketing (901287)*, Yorkshire Tourist Board, 2004-2006  
*North Yorkshire Tourism Partnerships (901279)*, Various contractors, 2004-2010  
*YT Structure & Delivery (901480)*, Yorkshire Tourist Board, 2005-2008  
*Dalby Forest Visitor Centre (901274)*, Forestry Commission, 2005-2008  
*South Yorkshire Destination Management Partnership (901196)*, Sheffield City Council, 2005-2009  
*Sheffield City of World Snooker (901428)*, Sheffield City Council, 2005-2011  
*Northern Way Overseas Visitor Market (902095)*, Yorkshire Tourist Board, 2006-2008  
*DMO in the Humber (901288)*, East Riding of Yorkshire Council, 2006-2009  
*Regional Tourism Marketing (902105)*, Yorkshire Tourist Board, 2006-2009

*Indian International Film Academy* (902046), Various contractors, 2006-2009  
*Tour of Britain* (901847; 903076), Tour of Britain, 2006-2009  
*Northern Way Public Art* (902089), Various contractors, 2006-2010  
*Clipper* (902069), Various contractors, 2006-2011  
*West Yorkshire Tourism Partnership* (902103; 901881), Kirklees Council, 2007-2010  
*Regional Tourism Change Programme, Core YTB* (903444) and *Promotion* (904376),  
Yorkshire Tourist Board, 2008-2010  
*Regional Tourism Programme* (903595), Welcome to Yorkshire, 2009-2012  
*Harrogate International Conference Centre* (903688), Harrogate Borough Council, 2009-  
2012  
*National Media Museum: Internet Gallery* (903585), National Museum of Science and  
Industry, 2009-2012  
*Events Programme* (904359), Welcome to Yorkshire, 2010-2012

**This paper is part of a suite of 'Learning Legacy' reports produced by Yorkshire Forward** in 2011. The series is intended, as far as we can, to capture knowledge, achievements and lessons learned from regional economic development. It seeks to pass knowledge on to other bodies who may be able to apply it now or in the future.

We are grateful to all the many partner organisations, businesses and individuals who have contributed to this work over Yorkshire Forward's lifetime.

**In addition to an Overview, the full range of modules in the series covers:**

- 1: Economic Strategy
- 2: Research, Intelligence and Evaluation
- 3: Responding to Economic Shocks
- 4: Low Carbon Economy
- 5: Enterprise - Helping New Businesses to Start and Survive
- 6: Supporting Existing Businesses
- 7: Access to Finance
- 8: International Trade and Investment
- 9: Sectors and Clusters
- 10: Innovation
- 11: Skills
- 12: Urban Renaissance and Physical Regeneration
- 13: Social Regeneration and Inclusion
- 14: Transport
- 15: Rural Renaissance
- 16: Tourism and Major Events

Useful web links and access points for modules from this series will include:

Leeds City Region LEP <http://www.leedscityregion.gov.uk/LEP.htm>

Sheffield City Region LEP [www.sheffieldcityregion.org.uk/local-enterprise-partnership](http://www.sheffieldcityregion.org.uk/local-enterprise-partnership)

York and North Yorkshire LEP <http://www.ynylep.co.uk/>

Humber LEP (web address to be confirmed)

BIS Local <http://www.bis.gov.uk/policies/economic-development/bis-local-offices>

Yorkshire Forward [www.yorkshire-forward.com](http://www.yorkshire-forward.com)



The Region's  
Development Agency