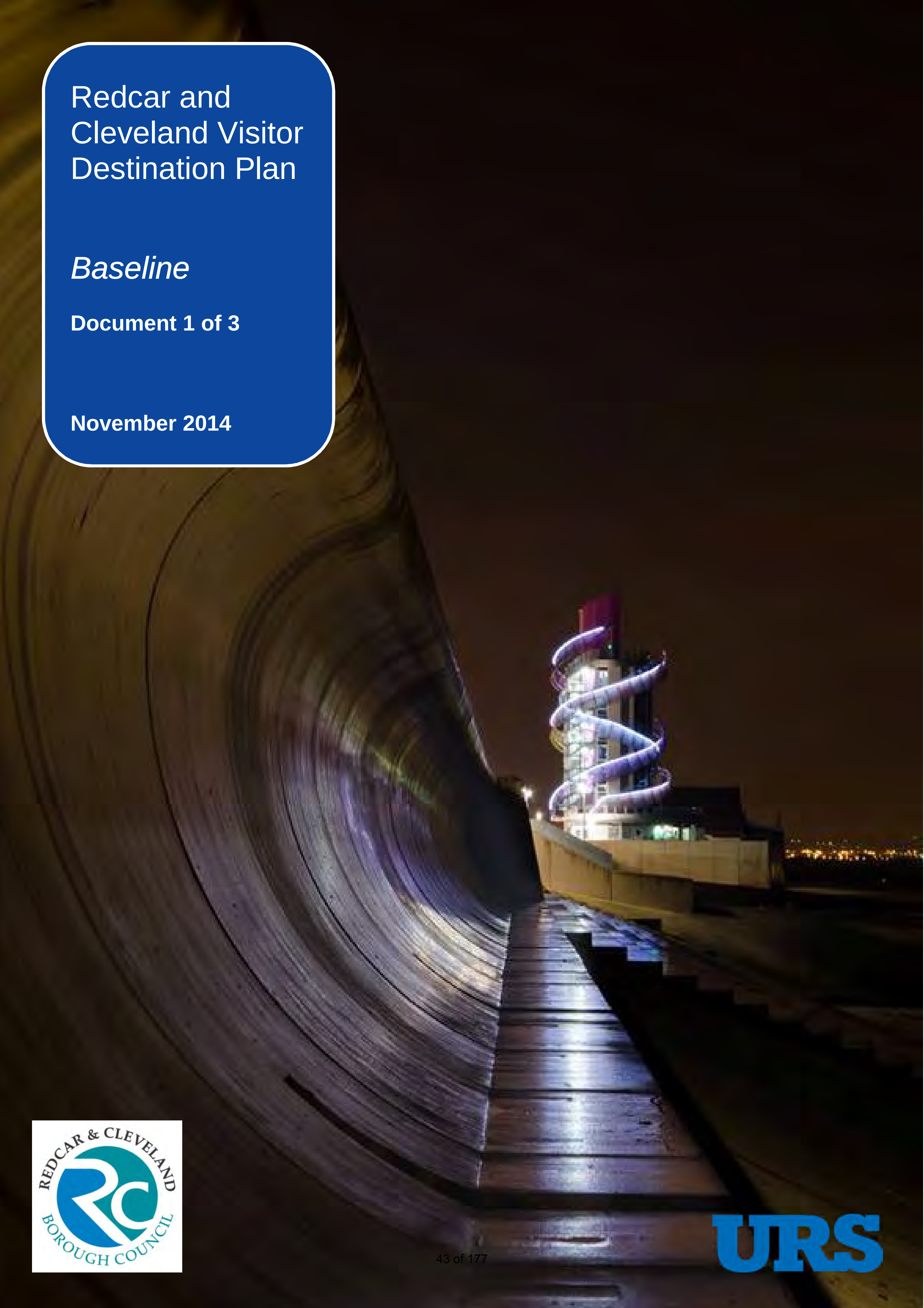
Redcar and Cleveland Visitor Destination Plan

Baseline

Document 1 of 3

November 2014



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ACRONYMS

Acronym	Meaning
BETA	British Equestrian Trade Association
BFSLYC	British Federation of Land and Sand Yacht Clubs
BKSA	British Kitesurfing Association
BLF	Big Lottery Fund
DMO	Destination Management Organisation
FRED	Friends of Redcar
FTE	Full-Time Equivalent
GB DVS	Great Britain Day Visitor Survey
GB TS	Great Britain Tourism Survey
HLF	Heritage Lottery Fund
IPS	International Passenger Survey
LEP	Local Enterprise Partnership
LNR	Local Nature Reserve
NCN	National Cycle Network
NTO	National Trail Office
ONS	Office for National Statistics
RCBC	Redcar and Cleveland Borough Council
RDPE	Rural Development Programme for England
SEP	Strategic Economic Plan
STEAM	Scarborough Tourism Economic Activity Monitor
SWOT	Strengths, Weaknesses, Opportunities and Threats
TIC	Tourist Information Centre
TVU	Tees Valley Unlimited
VDP	Visitor Destination Plan

INTRODUCTION

1. INTRODUCTION

1.1 Overview

URS was commissioned to undertake a Visitor Destination Plan (VDP) for Redcar and Cleveland. The VDP provides a shared vision and framework for the future development of the visitor economy in the area up to 2020.

The VDP provides the framework and a rationale for further investment setting out specific actions that partners can work together on to further develop the visitor, tourism and leisure economy in Redcar and Cleveland.

It articulates the roles of different stakeholders and identifies clear actions on how the area can attract further visitors and maximise the economic benefit created. The VDP links to other local and sub-regional initiatives and strategies and requires the support of stakeholders at the local, sub-regional and inter-regional level to be a success.

This is the first of three documents that make up the VDP. See **Section 1.4** for more details.

1.2 Aims of VDP

The aims of the VDP are to:

- Review and understand existing markets, visitor types and competition;
- Identify potential growth sectors and identify any barriers;
- Draw comparisons and lessons from other relevant destinations;
- Identify actions that link visitor economy activity with current strategies and funding sources; and
- Produce an indicatively costed and timed action plan targeting growth opportunities and markets and providing a steer for future investment in the borough.

1.3 Approach

For the VDP to be a success it is important that all relevant stakeholders are engaged. The approach adopted for the VDP includes a range of both primary and secondary research to capture the views of relevant stakeholders in the borough as well as the sub-region, region and national levels. The VDP brings together these views in one coherent document.

The approach to the work included:

- A review of national research, policy and strategy;
- A number of visits to key towns, villages and attractions in Redcar and Cleveland;
- An assessment of local data, policy and strategy including marketing material, visitor numbers and research, company websites, the events programme and STEAM[1];
- An examination of tourism and marketing websites including Welcome to Yorkshire, Visit England, Trip Advisor and British Destinations;

[1] *STEAM (Scarborough Tourism Economic Activity Monitor) is a model for measuring local tourism activity*

- Telephone and face-to-face interviews with 20 stakeholders from RCBC, Tees Valley Unlimited, local visitor attractions, neighbouring local authorities, North York Moors, Welcome to Yorkshire, and Visit England;

- An electronic business survey which was completed by 24 organisations that provide tourism accommodation or are visitor attractions. The full results from the business survey are presented in **Document 3**; and

- Three workshops with stakeholders from accommodation providers, restaurants, visitor attractions, town and parish councils.

A list of the organisations who have participated is set out in **Document 3**.

1.4 Suite of Documents

This is the first of three documents that make up the VDP. The following sets out the content of each.

Document 1: Baseline:

- **Provides the strategic context** for the VDP by assessing relevant trends to provide an understanding of which factors could influence visitor behaviour in Redcar and Cleveland;

- **Sets out the local context** providing an overview of the key towns and wider catchment, alongside the political, transport, natural environment, heritage, and cultural contexts;

- **Presents an audit of the tourism and visitor economy** which includes accommodation providers, visitor attractions and activities, leisure facilities, neighbouring attractions, events, festivals and activity in complementary sectors; and

- **Profiles the current visitor market** and presents a statement of their economic impact.

Document 2: Action Plan:

- **Provides a summary of the baseline** in the form of a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis.

- **Establishes the direction of the VDP** by highlighting the overarching principles, a vision statement and high level objectives;

- **Details the specific actions, responsibilities and resources** to support growth and development in the visitor economy, based upon the previous analysis; and

- **Sets out a framework and process for monitoring the progress** and success of the VDP and identifies potential funding sources.

Document 3: Supporting Information:

- **Highlights good practice and lessons learned from elsewhere** in relation to the potential growth markets for the Redcar and Cleveland visitor economy.

- **Presents the results of the business survey;** and

- **Details the stakeholders who have contributed** towards the VDP.

STRATEGIC CONTEXT

2. STRATEGIC CONTEXT

The VDP needs to be realistic and achievable, aimed at maximising the benefits of visitors and related activity within the context of Redcar and Cleveland's main visitor assets and attractors. In order to achieve this there is a need to understand the characteristics of existing and potential future demand to identify the opportunities and challenges that this may present.

This is achieved by identifying the trends in consumer and visitor habits, spending patterns and market activity alongside wider factors such as economic, demographic, social, and technological change. As Redcar and Cleveland incorporates both a clear coastal and rural offer this section also includes commentary on these typologies.

2.1 Economic Value of Tourism

Tourism in England contributes £106 billion to the British economy, supporting 2.6 million jobs[2]. There are almost 210,000 VAT registered businesses in England in tourism sectors (this includes accommodation, food & drink, transport, travel agencies, cultural activities etc.)

£18.7 billion was spent by British residents on 101.8 million overnight trips in England, equating to 297 million nights away from home. Additionally £46.0 billion was spent on 1.4 billion domestic tourism day trips and £18.4bn was spent by inbound visitors, who made 28.6 million trips and stayed for 217 million nights[2].

Figure 2.1 illustrates that overnight trips made by British residents within England has fluctuated but was higher in 2013 than 2006. Additionally, trips made by inbound visitors have been increasing year-on-year from 2009.

Figure 2.1: Domestic Overnight and Inbound Tourism Trends, 2006 to 2013[2]

2.2 Wider Economic Trends

The recent recession, related increases in the cost of living and pressure on wages have all led to significant changes in the spending behaviour and priorities of consumers. These effects

[2] *Source: Visit England, May 2013*

are set to have an on-going impact on consumer spending as confidence increases more slowly with an emphasis on the demonstration of value from leisure and tourism activities.

This is leading to an increasing volume of domestic rather than overseas breaks, often referred to as the ‘staycation’ effect – i.e. more of its population holidaying within the UK rather than heading overseas. As demonstrated in **Figure 2.1**, domestic UK holidays have been increasing since the onset of the recession in 2008. The opportunity for Redcar and Cleveland is that the market is open to new and different types of destination in the UK. The challenge is to present a distinct offer in order to maximise this opportunity.

2.3 UK Population and Social Trends

Family change and ageing population

Changes in the make-up of the population will have a major effect on society and subsequently the choices that consumers make in respect of leisure activity. There is an increasing proportion of the population in young (0-18 years) and older age groups (55 years+) and the shrinking working age population are key drivers in this context. One of the consequences is the changing shape of the family and roles within it. Examples include the role of grandparents in terms of childcare, greater integration between generations, growth of untraditional families with increasing numbers of single parents, step parents and gay parents.

An aging population presents different needs which enterprises and amenities need to accommodate, particularly in terms of accessibility. The next retired generation of baby boomers will also have a different attitude, lifestyle and propensity for leisure activity than previous generations and is also better financially equipped. This means that destinations will need to be able to present suitable experiences to match different leisure interests.

There are also an increasing number of younger people which is likely to have a positive impact on destinations and businesses catering for the family market. However, it will also potentially accentuate seasonality issues especially in light of the government’s increase in penalty fines to families that take children out of school for holidays during term time.

Many references have been made to the squeezed middle or working age population who are increasingly pressed in terms of time and money, with impacts on leisure time, type of leisure trips taken and the group composition for these trips. Short breaks have overtaken long holidays as the predominant domestic holiday type; activity, hobby, special interest and indulgence breaks are ever growing in popularity; and grandparents are increasingly taking their grandchildren for day trips and holidays as part of their growing role as carers. Each of these trends can create a market opportunity for a visitor destination, but one which needs to be met through investment in appropriate products and marketing campaigns.

Healthier and more active lifestyles

There is an increasing emphasis on having a more active and healthier lifestyle, reinforced by rising perceptions of pressures on individual‘s time and blurring of the lines between work and leisure. This creates a greater desire for ‘get-a-way’ breaks and treating oneself. As a result, visitor products and offers that were once considered niche have become more popular such as spa breaks and adrenaline sports like surfing and rock climbing.

This increasingly health conscious trend is forecast to continue. This is already impacting on tourism through the availability of activity related to cultural capital and the learning of new skills or acquisition of knowledge through leisure activity. Examples here include the increase in craft tourism and areas relating to cuisine and hobbies. This is in part driven by the reduction in more frivolous spending brought about by recessionary pressures and the subsequent need to obtain value from leisure activity.

2.4 Technology

The ability to compare and search an ever increasing range of destinations via the internet and on specific mobile applications is changing the way people gather information, make choices, and purchase tourism products. Moreover, this type of approach to purchasing is likely to become the norm particularly for younger age groups.

This has important implications for providers not only to demonstrate value but also to be smart in their use of technologies, marketing channels and information to ensure they are maximising their routes to market. As well as a means of reaching the market, technology and media are also an increasingly common means of intelligence on visitor's experiences and ratings that consumers use to help decision making.

Similarly, increasing pressures on time and the rapidly expanding volume of information on leisure opportunities mean that simplicity in the planning process is becoming an increasingly important factor in determining consumer's choices. A key issue here is that, with many tourism enterprises being small and lifestyle businesses, many operators are yet to become savvy with these new types of media and advertising platforms.

2.5 Countryside/Rural Tourism

The trends within countryside/rural tourism are important to the Redcar and Cleveland context. Research by VisitEngland in 2013[3] suggests the following:

- 22.0% of all overnight holiday trips are made to the countryside. This has remained fairly consistent since 2006 (as illustrated in **Figure 2.2**).
- Nearly three-quarters of overnight stays at countryside destinations takes place between April and September.
- Non-serviced accommodation is a popular choice for domestic trips to rural destinations, with 49% of visitors staying at camping/caravan sites or other self-catering accommodation (compared to 37% for other trips).
- Overnight trips to the countryside are more likely to be made by higher social grades[4].
- A substantial proportion[5] of overnight visitors to rural destinations come from people within the region, showing a strong correlation with holidaying and drive time catchments.
- Day trips to the countryside follow the profile of all day trip takers in terms of social grade[6], children in the party[7], and time spent at the destination[8].

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[3] *VisitEngland, England's Countryside: What are the opportunities?, 2013*
[4] *39% of overnight countryside trips are made by 'AB' social grades and 32% by the C1grade compared to 36% and 30% respectively for all trips*
[5] *This is around a quarter for most regions but peaks at 40% in the North West*
[6] *30% of countryside day trips are made by 'AB' social grades and 29% by the C1grade compared to 29% and 30% respectively for all trips*
[7] *17% of countryside day trips are made with children compared to 16% for all trips*
[8] *39% of day trips to the countryside last between 3 and 4 hours, 24% are 4 to 5 hours, 12% are 5 to 6 hours and 25% are over 6 hours. This compares to 38%, 24%, 12% and 26% respectively for all trips*

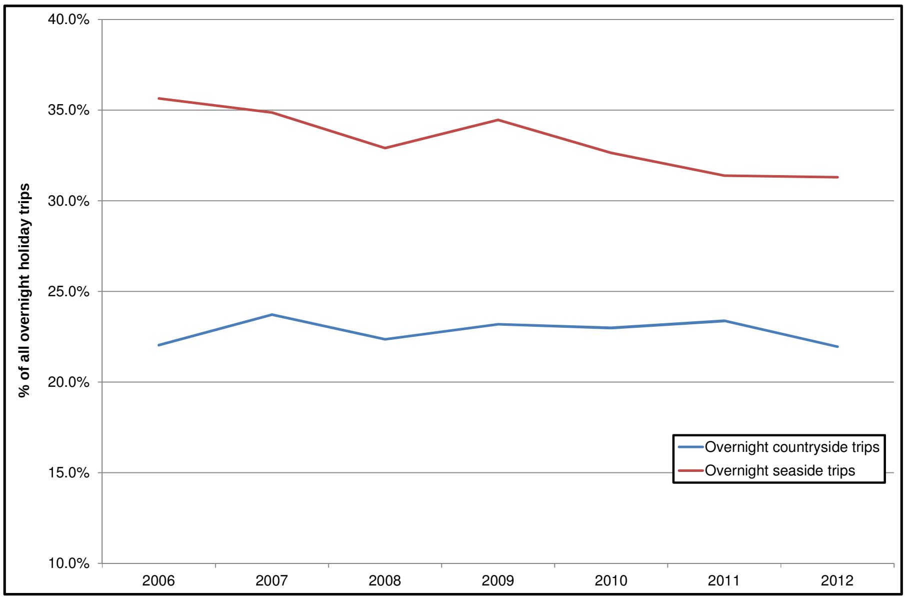
- Countryside visitor attractions are seeing an increase in the use of unpaid volunteers.

2.6 Seaside Tourism

The trends within seaside tourism are also important to the Redcar and Cleveland context. Research by VisitEngland in 2013[9] suggests the following:

- 31.3% of all overnight holiday trips are made to the seaside. This has fallen from 35.6% from 2006 (as illustrated in **Figure 2.2**).
- Almost half of overnight stays at seaside destinations take place between July and September, demonstrating strong seasonality for these types of destination.
- 44% of all domestic seaside trips which involve an overnight stay include camping / caravanning sites or a holiday camp.
- Seaside trips, both day visits and overnight, are more likely to include children[10], be made from people in lower social grades[11] and involve longer stays[12] than other types of overnight trips.
- The seaside is seen as a 'low-cost' destination and more likely to be seen as good value.
- Seaside trips are also now regarded as offering more than just the beach with people perceiving them as somewhere to relax, sightsee on foot and go for a short walk.

Figure 2.2: Overnight Countryside and Seaside Trips as a % of all Overnight Holidays



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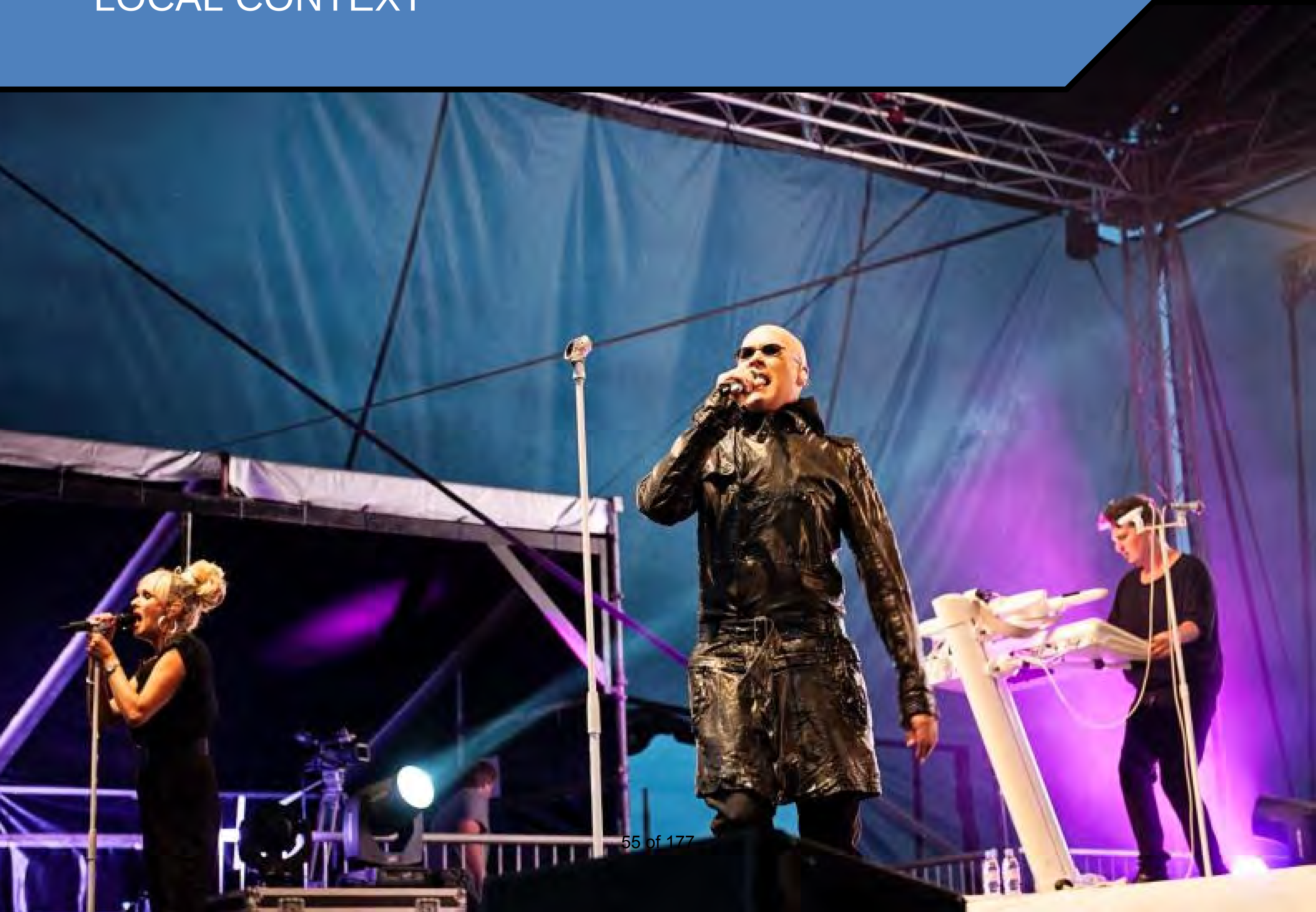
[9] *VisitEngland, England's Seaside: What are the opportunities?, 2012*
[10] *47% of overnight seaside tips involve children compared to 34% for all trips. Whereas, 24% of day trips to the seaside include children compared to 16% for all trips*
[11] *The DE social grades make up 20% of overnight seaside trips compared to 15% for all trips. Whereas, the same group make up 25% of day trips to the seaside compared to 20% for all trips*
[12] *32% of overnight trips to the seaside are for 4 to 7 nights and a further 30% are 8 nights or more. This compares to 26% and 17% respectively for all overnight trips*

LOCAL CONTEXT



3. LOCAL CONTEXT

3.1 Introduction

Redcar and Cleveland is located on the North East coast covering 96 square miles. It falls within the Tees Valley Local Enterprise Partnership (LEP) area and has a population of around 135,000 people. Due to its location and history, the area suffers from an identity crisis[13] with residents, visitors and non-visitors associating the area with Tees Valley, North Yorkshire /Yorkshire, and the North East interchangeably.

The council has recently invested £75m in a series of regeneration projects that are designed to retain, enhance and broaden the visitor appeal of the area. This includes:

- Redcar Beacon, an 80ft attraction offering 360 degree views;
- Tuned In, a dedicated arts and media facility for children and young people;
- Redcar and Cleveland Leisure and Community Heart, a multi-use building mixing business with leisure;
- The Palace Hub, a workspace for creative industries;
- Coastal sea defences; and
- Public art installations.

Image 3.1: FlowRider at Leisure and Community Heart

Redcar and Cleveland is an area of immense contrasts and includes the vast industrial complexes of Wilton International, the steel industry and Teesport (which have been cited as reasons for negative perceptions from a tourism perspective), as well as the attractive coastal resorts of Redcar, Marske and Saltburn, the ancient market town of Guisborough and scenic countryside edging the North York Moors National Park.

RCBC is made up of three distinct areas, namely: Redcar, Saltburn and Guisborough. They are disparate with differing visitor profiles and markets. Other small towns in the borough include Marske-by-the-sea, Brotton, Skinningrove, Skelton, Loftus and Eston. A further description of the three main areas is set out below.

Redcar

Redcar is a traditional seaside resort that caters for all ages and interests. The beach has gained a Seaside Award for its cleanliness and good water quality. Redcar Racecourse which hosts 18 days of horse racing from April to November is one of the most popular visitor assets in the area. Also within Redcar are the world's oldest lifeboat (The Zetland), Kirkleatham

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[13] *As suggested by a number of stakeholders*

Museum (local history museum), the Owl Centre, and the latest regeneration projects outlined above including the Beacon and the Leisure and Community Heart.

Redcar has also played host to Hollywood Director Joe Wright, a film crew and over a thousand extras for the filming of the 'Dunkirk' scenes for the award-winning film 'Atonement'.

Saltburn

Saltburn-by-the-Sea is a Victorian seaside resort offering visitors beautiful gardens, preserved woodland, long stretches of sandy beach and rugged sea cliffs. It is also home to the oldest remaining water balanced cliff lift in Britain as well as a miniature railway and the Victorian Grade II listed pier. The town is on the Cleveland Way (national walking trail), has excellent surfing capabilities and is a very popular destination for fishing.

Saltburn is also home to the infamous 'Yarnbombers' who regularly make national news with their knitted creations that mysteriously appear during the night.

Image 3.2: Saltburn Beach

Guisborough

Guisborough is a historic market town that lies at the bottom of the Cleveland Hills. It is often referred to as the Gateway to North Yorkshire and is on the northern edge of the North York Moors National Park. The town's cobbled street is the focus of the town's shops, pubs, eating places and traditional markets still trade there. The Guisborough Forest & Walkway Visitor Centre is a popular visitor destination. The Gisborough Priory, with its remaining eastern gable standing at 97 foot high overlooking Guisborough, is also in the area, as is Gisborough Hall.

3.2 What Makes Redcar and Cleveland Unique?

The following is a list of some of the special qualities of the borough highlighted by people in the workshops:

"The fascinating industrial heritage"

"The amazing coast line with the highest cliffs on the east coast"

"The ancient woodlands of east Cleveland that links the moors with the coast"

"An excellent network of public footpaths and cycling routes"

"It is an amazing base which to explore so many great places"

"The extreme sports"

"Beautiful rural areas"

"The history and the environment are top class"

"The coastal walks and the many other outdoor activities on offer"

"The golden beaches"

"Roseberry Topping"

"Water sports"

"It's quirkiness and cultural vibrancy"

"It's a hidden gem that people just have to discover"

"Such a wide range of niche activities"

3.3 Catchment

Within a one hour drive sits a potential market of almost 3.3 million and within two hours this extends to over 13 million people. This is illustrated in **Figure 3.1** below.

Figure 3.1: Drive Time / Catchment Areas*

Drive Time from Centre of Redcar*	Catchment
30 minutes	1.26m
60 minutes	3.28m
90 minutes	6.88m
120 minutes	13.30m

Source: URS Calculations, 2014
** Approximate based on travelling 25 miles in 30 minutes*

3.4 Economic Development

Tees Valley Unlimited (TVU) is the LEP covering the Tees Valley (which includes Redcar and Cleveland). TVU is a business led partnership and plays a key role in attracting additional private sector investment and directing European and various growth funding throughout the sub-region.

TVU's strategy for investment is covered in the Strategic Economic Plan (SEP) which aims to create 25,000 jobs and create £1billion of additional value to the economy.

TVU does not have a specific focus on the visitor and tourism economy. However, the SEP has two main objectives and supporting actions where the visitor and tourism sector can capitalise on and contribute to, these are:

1. *Attract and retain wealth – providing the means by which the Tees Valley acts as a quality place to live, work and visit.*

- Town centres, retail and leisure – providing pump priming funding to encourage wider private investment to improve the fabric of town centres;
- Natural, arts, heritage and rural assets – these are recognised as a key sub-regional strengths and key elements in making Tees Valley unique and a place that people choose to live;
- Culture – the value of culture in helping to underpin growth in arts, heritage and digital businesses, alongside wider contributions to improving the quality of place and labour market;
- Rural economy – improving the competitiveness of rural businesses many of which are operating in the visitor and tourism sectors is a key action.

2. *Develop the workforce – secure improved skills to address future demand and growth*

- The visitor and tourism economy provides a range of good job opportunities across skill levels and occupations. As such the sector is a real means by which to address both economic and social issues of unemployment, labour market participation and developing opportunities for all.

The SEP also recognises that the visitor economy is dominated by day visitors with a need to encourage people to stay for longer and increase the economic value.

There are real opportunities for the VDP to provide a contribution to the sub-regional economy that provides new jobs and economic growth and a means for training and skills development.

3.5 Access and Transport

The road network for accessing Redcar and Cleveland is a strength. Redcar is connected to the A1 (40 minutes) by the A66 via Middlesbrough (20 minutes) and Darlington (35 minutes). Access to Durham (50 minutes), Newcastle-upon-Tyne (65 minutes) and Sunderland (55 minutes) is via either the A1 or the A19. The A19 and A172 connect Redcar to Thirsk (40 minutes) and a coast road provides connections to Whitby (45 minutes) and Scarborough (75 minutes) (A174 and A171).

National and regional accessibility to Redcar by rail is limited. Redcar is a mainline station, however passengers need to change at Darlington (approximate 40 minute journey time) or Middlesbrough (approximate 10 minute journey time) to access East Coast Mainline services to the station. There are no direct services between Redcar and Newcastle (90 minutes), Durham (70 minutes), Manchester (160 minutes), Leeds (115 minutes), or London (210 minutes). Local train services to Redcar are provided by Northern Rail.

Redcar is approximately 20 miles / 30 minutes from Durham Tees Valley International Airport. There are daily flights to other regional airports in the UK. There are also flights to part of Europe (including Netherlands and Italy) from a number of scheduled airlines including KLM, Flybe, and Eastern Airways. Redcar is also serviced by Newcastle Airport (55 miles / 75 minutes) and Leeds-Bradford International Airport (65 miles / 90 minutes).

The nearest ferry terminal to Redcar is in Newcastle which offers services to Amsterdam.

3.6 **Landscape and Countryside**

The landscape and natural environment is one of the key assets of the borough. The coastal landscape includes one of the longest unbroken stretches of beach in the country running from South Gare to Saltburn (almost 10 miles). Roseberry Topping is the most prominent and popular hilltop in the borough. It is a popular place to walk, particularly for families, and offers 360-degree views of the North York moors and the industrial sites of Middlesbrough.

Further information is set out in **Section 4.3** regarding the use of the landscape and countryside for visitor activities.

Image 3.3: Roseberry Topping

3.7 **Heritage and Culture**

The borough has an abundance of heritage and culture features and assets that already have visitor associations. Key facts and sites are listed below:

- Guisborough is listed in the Domesday Book and the ruined Gisborough Priory dates back to the 12th century. Other historic sites here include Saint Nicholas' Anglican Church, home to the de Brus cenotaph and built mainly from stone taken from the priory, and Gisborough Hall, the ancestral home of Lord Gisborough, which now serves as a hotel and popular venue for wedding receptions.

- Redcar originated as a fishing town in the early 14th century and was until the mid-19th Century when Redcar emerged as a seaside tourist destination. This followed the opening of the Middlesbrough to Redcar Railway and it became a resort for Victorian tourists.

- Saltburn was founded in 1861 by the entrepreneur Henry Pease who also founded the Stockton & Darlington Railway and the town of Middlesbrough. He also opened The Zetland Hotel, one of the world's earliest purpose-built railway hotels, with its own private platform.

- Saltburn also has a smuggling past which was previously illustrated in the Saltburn Smugglers Heritage Centre. This is currently closed but there exists some ambition from a community group to reopen it.

- Redcar is home to the oldest surviving lifeboat in the world - The Zetland. It was built in 1802 and saved over 500 lives until the last outing in 1880.

- The borough is steeped in the history of Ironstone Mining with the discovery of the Cleveland ironstone seam taking place in Skinningrove in 1847. In 1850, John Vaughan discovered ironstone on the Eston hills. This ended up becoming the main seam of ironstone in East Cleveland and Eston was the largest drift mine in the area as the ironstone mining industry developed.

- The Redcar Town Clock is dedicated to King Edward VII. He was a regular visitor to the area and when he came to the throne it was decided by the townsfolk to celebrate with a coronation clock which later became a memorial clock. Today it is a Grade II listed building.

- Famous foods include; the Lemon Top which consists of dairy ice cream in a cone, with a blob of lemon sorbet on top, Chicken Parmesan which originated in Middlesbrough but are very popular in the borough, and like most seaside resorts – fish and chips.

- There also exists links to a number of personalities and celebrities including Len Tabner, Captain Cook, Mo Mowlam, Roy Chubby Brown, Chris Rea, David Coverdale, Gertrude Bell, Atonement filming, Dame Tanny Grey.

Image 3.4: Ironstone Mining Museum

3.8 Employment

The traditional employment base of Redcar and Cleveland has been manufacturing based on steel, chemicals and heavy engineering. However, over recent years, there has been a decline in these industries which has impacted upon many communities and resulted in areas of urban deprivation and a declining population. The chemical industry, mainly based at Wilton International, is an important part of the local economy. The steel industry also remains an essential part of the economic base with great efforts being made to secure its long-term future in the Tees Valley. The borough is also well known for Teesport, which is one of the largest ports in the UK.

This represents a need to diversify the economy, with tourism/visitor economy being an area of potential growth. More details on the growing importance of employment in this sector are illustrated in **Section 5.3**.

Image 3.5: Tourist on Eston Nab

TOURISM AUDIT

4. TOURISM AUDIT

4.1 Introduction

The following section sets out the existing tourism offer in the borough. It details all tourism related resources including; accommodation, visitor attractions and activities, leisure, events, catering, retail, and other supporting services. The audit also establishes gaps in provision.

4.2 Accommodation

Accommodation stock is collected by VisitEngland who undertake a census of:

- All Quality Assessed Accommodation;
- Accommodation listed in external business databases;
- Accommodation registered with regional delivery partners.

This information is summarised in **Table 4.1** for the borough[14].

Table 4.1: Accommodation Stock, Rooms and Bedspaces

	Establishments	Rooms	Bedspaces
Serviced*	46	619	1,135
Self-catering	29	31	153
Campsites/caravan parks	4	21	66
Total	**80**	**671**	**1,354**

Source: VisitEngland, 2012
** This includes hotels, guest houses, B&B's*

The business survey conducted as part of this study assessed occupancy levels of accommodation providers. Only seven businesses were able to respond to this but 4 of the 7 suggested that occupancy had increased as compared to the previous 12 months, 2 stated it remained relatively consistent, with only 1 seeing a decline.

The following commentary is adapted from an Accommodation Study of Tees Valley which was conducted in 2009.[15] Wherever possible we have aimed to confirm this is still the case now. This study suggests that the supply of accommodation in Redcar is mainly small, lower grade, non-inspected hotels, large guesthouses and pub accommodation businesses, catering primarily for the contractor market.

Across the borough there is just one four-star and two three-star hotels. Occupancies are reasonably strong for 3 star hotels, which are on a par with the Tees Valley 3 star average and above the regional average for achieved room rates. Achieved room rates are higher here

[14] *For purposes of comparison – RCBC also maintains a database of accommodation providers within the borough which shows 77 providers and the STEAM database has 71.*
[15] *Hotel Solutions 2009; Tees Valley Hotel Futures*

than in Darlington and Hartlepool, due primarily to stronger weekend demand on double occupancy rates.

The key midweek market for accommodation is local corporate demand, with larger businesses such as Wilton International, the Corus steelworks and companies in Middlesbrough providing a high level of demand. Other midweek markets include shooting parties and general midweek breaks.

Key weekend markets include those attending weddings, visiting friends and family, attending Redcar Racecourse, people going fishing and playing/watching golf.

The Accommodation Study suggests that corporate demand is going to grow significantly over the next decade with growth in the petrochemicals industry and the new energy sector at Wilton International and South Tees. This is likely to create increased demand for budget hotel accommodation, with the implication being that there is a gap in this market.

4.3 Visitor Attractions and Activities

The borough has a range of visitor attractions including Redcar Beacon, Saltburn Pier, Saltburn Miniature Railway, Redcar Racecourse, Kirkleatham Owl Centre, and Saltburn Cliff Lift. It is also home to six art galleries[16], six museums[17], six large parks and gardens[18] and a number of amusement arcades.

Image 4.1: View of Saltburn Pier from Cliff Lift

Another asset and attraction for residents and visitors alike are the markets of the borough: Guisborough has its traditional markets every Thursday and Saturday and Farmers Markets every 2nd Saturday of the month; Redcar has open-air markets every Friday on the High Street and car boot sales at Redcar Racecourse on Sundays; and Saltburn has a Farmers Market every 2nd Saturday of the month.

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[16] *Keith Moss Photography, Profile Gallery, Saltburn Gallery, Wold Pottery and Saltburn Studios and Gallery in Saltburn and The Gallery in Guisborough*
[17] *Cleveland Ironstone Mining Museum, Guisborough Museum, Kirkleatham Museum, Winkies Castle, Ormesby Hall, and Zetland Museum*
[18] *Errington Woods, Flatts Lane Woodland Country Park, Guisborough Forest Walkway, Locke Park, Saltburn Valley Gardens and Zetland Park*

Most of the visitor attractions in the borough are owned by RCBC. **Table 4.2** sets out visitor numbers to attractions where it is known.

Table 4.2: Attraction Visitor Numbers

Attraction	2008	2009	2010	2011	2012	2013
Ormesby Hall*	16,042	19,604	18,675	21,072	-	15,599
Cleveland Ironstone Mining Museum*	5,232	6,199	7,464	7,283	10,236	9,771
Guisborough Museum*	1,211	1,400	1,118	1,241	-	-
RNLI Zetland Lifeboat Museum*	5,345	7,360	6,620	7,984	-	-
Winkies Castle*	-	-	-	764	-	-
Kirkleatham Museum**	-	42,184	41,883	59,190	51,780	60,236
Cleveland Way (through Saltburn)**	21,276	29,689	23,562	29,004	30,496	30,340
Saltburn Cliff Lift**	-	-	-	115,830	140,742	167,781
Redcar Racecourse***						41,000

** Source: VisitEngland, 2013, ** Source: RCBC, 2013, *** Redcar Racecourse*

The table demonstrates that, with the exception of Saltburn Cliff Lift and Kirkleatham Museum, the attractions are on the whole relatively modest in size. Each of the attractions is of a theme that can motivate special interest visits, however on the whole the attractions are likely to cater towards a local audience (i.e. residents and day visitors) and those who are already holidaying in the area.

The natural environment associated with the coastline and countryside is arguably the borough's greatest assets. These characteristics have a significant pull factor. Important visitor activities that utilise these environmental characteristics include:

- People going to the beach, with this arguably one of the predominant leisure activities within the borough, especially in Redcar and Saltburn.
- Surfing at Saltburn has hosted National events such as the UK Pro Surf Championships. Additionally, Saltburn Surf School is the only surf school approved by Surfing Great Britain on the East Coast of England.
- Other watersports are popular including: windsurfing and kite surfing at Coatham beach; jet skiing in Redcar; diving due to the numerous wrecks which lie along the coast; and sailing at Scaling Dam for example. Dennys Diving offers lessons and equipment purchase for diving the nearby wrecks.
- Fishing is popular along the coast, particularly in South Gare, Redcar, Saltburn, Staithes and Scaling Dam.

- There are a growing number of walking opportunities within the area. This includes: the Cleveland Way National Trail[19]; the Saltburn Valley Gardens (2 miles easy access trail), the Great Ayton Try a Trail (7.3 mile circular trail to heights of Roseberry Topping), Guisborough has recently gained Walkers are Welcome Status[20]; Redcar & Cleveland Ironstone Heritage Trail[21]; The Tees Link; and there are leaflets available on eight other walks within the borough of varying lengths and themes[22].

- Likewise, there are many opportunities for cycling including: two National Cycle Network (NCN) routes (Route 1 and 165); mountain biking and cycling at Guisborough Forest; mountain biking at Eston Hills; and some associated retail in the area[23].

- Saltburn Valley Gardens has a host of flora and fauna with ancient semi-natural woodlands to the southern end of the Valley in contrast with the formal gardens to the north. The Cleveland Way National Trail passes through the Valley and it boasts Green Flag Status.

- There are a number of horse riding schools across the borough which promote this activity as a means for exploring the countryside and coast. There are also five clusters of horse riding routes with some horse box parking on these routes[24]. In addition, there are three horse box parking amenities along the coastal zone, at Redcar (Coatham), Marske-by-the-Sea; and Saltburn, these support horse riding along the beach.

- The borough has four golf courses including Cleveland Golf Club which is a Championship links course.

- There is a growing interest in bird watching / ornithology, with 6 Local Nature Reserves (LNR) and a number of other parks, gardens and woodlands.

- Guisborough Forest and walkway has been awarded Green Flag Status. It is a popular tourist destination for walkers, cyclists and people looking for red deer and nightjars.

4.4 Leisure Facilities

Redcar and Cleveland has a range of leisure facilities which support the visitor economy including equestrian centres / horse riding schools, leisure centres, angling/fishing shops, diving shops, surf school, skate parks, and golf courses. Each of these facilities can be utilised for the purpose of encouraging visitor activity, including overnight tourists.

The supply and quality of indoor leisure facilities has been criticised in the past, however the opening of the Redcar Leisure and Community Heart has delivered a much improved amenity that has been designed to have a broad audience base, including visitors. The centre

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[19] *The Cleveland Way is the second oldest British National Trails route andl runs for 109 miles. It starts in Helmsley, heads across the heather moorland of the North York Moors, before reaching the coast at Saltburn. From here it continues along the North Yorkshire coastline to Filey*

[20] *Walkers are Welcome towns and villages are places which have something special to offer walkers. Obtaining this status brings a number of benefits including strengthening the town's reputation as a place for visitors to come to enjoy the outdoors and ensuring that footpaths and facilities for walkers are maintained in good condition, benefitting local people as well as visitors.*

[21] *The Ironstone Heritage Trail celebrates the iron and steel history of the borough. Linking Eston and Skinningrove the trail follows public footpaths passing industrial sites*

[22] *e.g. wildlife and mining heritage, geology, including those associated with two other country parks, namely Saltburn Valley and Flatts Lane Woodland Country Park*

[23] *e.g. Bike Scene, Guisborough; Askeys Cycles, Redcar; Yarm Cycles, Yarm; Peddlers, Redcar*

[24] *South of Kirkleatham, south of Eston/A174, Guisborough Forest Centre, east of Guisborough and south of Loftus*

includes; a 6 lane 25 metre pool, a FlowRider which can be used for a range of board sports, a 100+ station gym, 8 court sports hall including badminton, volley ball, basketball, cricket, football and indoor hockey and a dance studio. The swimming pool and the FlowRider, in particular will have visitor appeal.

The borough only has one small cinema (The Regent Cinema in Redcar) and no dedicated theatres, with Saltburn Community Hall & Theatre, as a former church building operated by a community organisation with charitable status. There is also no indoor amenity able to support live music venues, comedy clubs, opera, or ballet for example. The borough does have a number of bingo facilities.

Image 4.2: Regent Cinema

The borough is directly adjacent to Middlesbrough and nearby to Stockton. These areas include cinema complexes and theatre venues such as the Middlesbrough Theatre and Stockton Civic Theatre. Similarly, Scarborough's Spa represents a nearby coastal venue for conferences, exhibitions, entertainment and events.

However, from the perspective of Redcar and Cleveland, the lack of provision means that the borough is unable to benefit from any type of demand that may exist for these types of facilities. This has the knock on effects of limiting the appeal of the evening economy and reducing the effectiveness of the arts/cultural sectors in helping promote out-of-season visits.

4.5 Neighbouring Attractions

Although this report is focussed on a plan for Redcar and Cleveland, other nearby attractions are illustrated for two main reasons. Firstly, tourists / visitors do not consider local authority boundaries when either choosing or exploring a local area. As a result, if they are to maximise the value of their stay in the area, many visitors will be keen to explore the wider area as well as Redcar and Cleveland itself

Secondly, a tourist residing in neighbouring areas could equally be persuaded to visit Redcar and Cleveland. For example, a visitor holidaying in Whitby could be persuaded to spend time in the borough either as an extension of the coastal holiday they are on, or as a means of engaging with either the market towns or the attractive countryside of the borough.

Figure 4.2 highlights some of the key neighbouring attractions, as well as key towns and cities. Some of these key towns and cities are tourist destinations in themselves such as Whitby (25 miles away) and Scarborough (45 miles) along the Yorkshire Coast; and York (55 miles) and Durham (35 miles) as historic cities which have a strong visitor appeal. There are also a range of other destinations including:

- **North York Moors National Park** – one of 13 National Parks in England and Wales, the moors is one of the largest expanses of heather moorland in the UK covering an area of 1,436 km^2 (554 m^2). It is popular for activities such as walking, cycling, horse riding, and watersports. It is also able to offer relatively unique activities and attractions such as GoApe, Stargazing in Dalby Forest, gliding, Fell and Road Running, and Flat Green Bowling.

- **Herriot Country –** a network of market towns and picturesque villages associated with James Herriot as a Vet-cum-Author, whose books were adapted for television by the BBC in its programme 'All Creatures Great and Small'. The key centres include Thirsk, Northallerton, Easingwood, Great Ayton, Bedale and Stokesley.

- **Yorkshire Coastline –** 45 miles of coastline stretching from Filey to Saltburn-by-the-Sea, the Yorkshire Coastline is revered for its varied and attractive setting, around half of which is within the North York Moors National Park. It is also home to the coastal resorts of Scarborough and Whitby.

Other key attractions within close proximity to Redcar and Cleveland that have the capacity to motivate visits to the wider area include: the Middlesbrough Institute of Modern Art; Hartlepool's Marina and Historic Quay; the Angel of the North in Gateshead; Head of Steam in Darlington; and Durham Cathedral and Castle which is a UNESCO World Heritage Site.

Figure 4.2: Key Neighbouring Attractions

4.6 Events and Festivals

RCBC is aiming to host approximately 130 events between April 2014 and March 2015. This includes sporting competitions, markets, arts, traditional fairs and community events. The Kirkleatham Museum will host a large number of exhibitions, which are included here.

The majority of the events are modest in terms of scale and will have a local audience profile such as family fun days and outdoor drama at Kirkleatham Museum (with c. 300 people at each performance). Other events such as the Saltburn Cycling Festival (c. 300 people), Saltburn Folk Festival (c. 1,200) and music events such as Rock the Ground! (c. 300 people) are likely to be more appealing to visiting audiences, although the estimated attendance levels are still relatively modest.

A number of larger and/or well-established annual events are known to draw many thousands of attendees such as Redcar Town Fair (c. 38,000 people), the Billy Crow fair (c. 20,000 people), Redcar Festival Week (c. 15,000 people), Redcar Christmas Light Switch on and Fair (c. 6,000 people), Redcar Rocks (c. 5,000 people), Redcar Beach Festival (c. 3,000 people), Eston Fair (c. 2,000 people) and Guisborough Fair (c. 2,000 people).

The events calendar is predominantly focussed in the summer. RCBC host the majority of the events with only a small number run by external events organisers. There is an opportunity to promote RCBC managed sites, such as the beach, to the private sector to run further events.

The consultation process has suggested that the events calendar within the borough is unstructured and poorly publicised. Given the high volume of events and the relatively condensed timeframe within which they take place, this issue needs to be explored further. Barriers to extending the events schedule should also be explored given that events can be used as a means of extending the tourism season. However, the lack of indoor venues is likely to be a key issue.

4.7 Retail

The retail offer differs between the main towns of the area:

- Redcar has a more modern 'high street' retail offer (than the two other towns) with a number of branded retailers such as Boots and H Samuel, interspersed with independent stores and has a market offering a range of products. There are also a high proportion of charity and £ stores. The Marks and Spencer store has recently been announced as closing.
- Saltburn has a high proportion of many specialist shops that help differentiate the retail experience to other nearby towns. The key retail themes include antiques, jewellery, furniture, flowers, arts & crafts, fishing tackle, street wear, health foods, fresh fish, bread and meats. The town also hosts a Farmers Market once a month.
- Guisborough has been a traditional market town for over 600 years with markets held every Thursday & Saturday, with the character of the town still reflecting this heritage. The town attracts visitors due to charm of the high street setting which has a wealth of Georgian and Victorian architecture, with many of the high street stores occupying a historic building. This gives Guisborough a more distinctive retail experience.

Although the combination of independent stores and markets provide a different type of high street experience to other towns and cities there is a lack of retail brands that have the ability to attract visitors such as John Lewis or Ikea. Added to this, the closure of such a prominent brand in Marks and Spencer could further impact upon the overall shopping experience.

There are other types of retail based around a theme (rather than a brand) which can act as visitor attractors including antiques, garden centres, boutique fashion, weddings, artisan food/delis/farm shops selling local produce.

Image 4.3: Redcar Town Market

4.8 Food and Drink

There are nearly 90 restaurants, cafés, pubs, bars and fast food outlets[25] in Redcar and Cleveland. Whilst not all of these are tailored to meet the needs of visitors, it demonstrates that there is some diversity available within this sector.

Anecdotally, however, the provision of food and drink has been described as poor in relation to the visitor economy. In particular, the night-time economy is seen as limited.

Food and drink provision is a key factor in the decision-making of visitors in choosing a destination to visit and that the connection between tourism and food is multifaceted. At a basic level, food and drink is a fundamental need. Therefore, the availability of places to purchase food and drink (whether through grocery stores or through dedicated catering services) are required to support visitors as well as local residents.

However, food and drink has over the years become an integral and integrated part of the overall visitor experience. Visitors tend to commit a high level of spend toward food and drink during their stay in a destination (as demonstrated in **Section 5.3**), whether the trip is for a day or overnight. Therefore, visitors are keen to ensure that they derive good value from this spend by receiving good quality food and drink.

Poor availability or poor quality in food and drink can lead to dissatisfaction with a destination. Conversely, good availability and good quality provision can lead to high satisfaction levels, which in turn is more likely to generate repeat visits and recommendations[26]. It is for this reason that VisitEngland are working with local destination managers to ensure that quality standards across the food and drinks sector meet if not surpass visitor expectations.

The sense that food and drink provision is of poor quality within Redcar and Cleveland is therefore a key issue.

[25] *Source RCBC, 2014*
[26] *e.g. Good quality food and drink is needed to be maintained to ensure overall destination satisfaction levels are retained – VisitEngland, Understanding Visitor Satisfaction 2012-13*

4.9 Visitor Services and Other Facilities

The level of resource at a local, sub-regional and regional level dedicated to supporting the visitor economy / tourism sector is limited. Visit Tees Valley used to coordinate tourism activity within the sub-region and promoted large scale events but was disbanded four years ago.

At a local level there was previously a dedicated tourism officer in RCBC, however the role ceased and the activities associated with tourism within RCBC are largely undertaken by a combination of the Cultural Services Manager, the Visitor & Town Centre Team Leader, three Town Centre Officers, and an Events and Concessions Officer.

Additionally, there is a limited marketing budget associated with tourism promotion and there are no Tourist Information Centres (TICs) within any of the main towns.

RCBC has maintained the 'visit' section of the www.redcar-cleveland.gov.uk website. This includes strong imagery, easy to navigate menus and sub-sections (e.g. Places to visit, Things to do, Events, Accommodation, Eating out, and Access), and downloadable maps (although some of the sections are a little out of date). However, as with many 'council-led' websites, the danger is that the 'visit' section gets lost within the rest of the content. In this respect, visitors have different needs and expectations from websites and information provision than local residents.

Other aspects relating to visitor services and facilities that have been identified include:

- There is a lack of promotion via both social media and leaflets/flyers at nearby service stations, hotels, etc.
- There is a lack of 'brown signs' highlighting tourism attractions and drawing in people who are driving nearby.
- Accessibility and movement within the borough could be improved, for example, leading people from one attraction to the next, such as via finger pointing signs.
- A potential gap / opportunity are for beach huts on Redcar or Saltburn beaches. RCBC currently offer annual lets for 20 chalets in Saltburn, on the cliff side, with a waiting list of over 200 people. The waiting list is made up of predominantly local residents and there is the potential to offer something similar for the visitor market.
- The availability and location of car parking has been cited as a weakness. There is no car park on the seafront and limited parking at some key leisure assets such as Locke Park and in Saltburn generally which is leading people to visit other destinations.
- Although there is a good quality network of roads, with limited congestion, travelling to, from and around the borough on public transport is seen as restricting. Some stakeholders suggest that the train and bus stations are too far away from the main attractions and there is little emphasis on trying to attract visitors.

4.10 Existing Marketing Activity

As highlighted above, the main form of marketing for the borough is through the 'visit' section of www.redcar-cleveland.gov.uk.

However, it needs to be recognised that there is an ever increasing number of information channels from which to research destinations in advance of visiting. The following provides a review of some of these channels as a means of demonstrating the other messages that a potential tourist/visitor could see before choosing whether or not to visit the borough.

Tripadvisor

Tripadvisor is one of the most popular tourism-based websites for gathering information. The main emphasis of the website is on providers (e.g. accommodation, attractions, catering); with the ability for visitors to leave their own reviews and provide a quality rating regarded as one its main appeals.

Appendix A provides a summary of a search conducted for each of the three key areas within Redcar and Cleveland on TripAdvisor. It demonstrates that although the satisfaction levels with the attractions are generally positive, the number of attractions and accommodation providers listed are considerably less than the reality which may leave some users with the impression that there is a limited offer overall and may look elsewhere.

TripAdvisor can be a contentious source of information on destinations and accommodation providers. The information in terms of the number of attractions and accommodation providers can often be misleading and suggest that the place has less to do than is the reality. However, the ratings and reviews can certainly influence prospective visitors. Therefore, the views as set out in **Appendix A** are of concern.

Another particular concern is the rating of Redcar Beacon (3.0 out of 5.0). A review of the comments suggests that the boldness of the design has divided opinion, something that is not in itself likely to deter visitors. However, the comments relating to customer service and experience are. For example, there are a number of negative comments relating to disabled access, the café, and the workshops being vacant.

Welcome to Yorkshire

RCBC is a member of ‘Welcome to Yorkshire’ and as such the area features on the yorkshire.com website under the destination of North East Yorkshire. A specific search on this section of the website brings up positive images and words about visiting the borough and on the three key towns. This includes the following:

- Redcar is described as having “*breath-taking landscapes, picturesque beaches, and endless coastline which make Redcar a truly idyllic seaside resort! Once famed as a fishing village, Redcar boasts an array of museums, galleries and monuments showcasing the town's rich history and heritage*”
- Saltburn is described as being a “*delightful coastal town which bestows plenty of Victorian charm and thrills. From the water balanced cliff lifts to the last remaining pier in Yorkshire, Saltburn promises its visitors an authentic seaside experience! There's plenty to entertain too as the town has an up and coming arts scene, lots of restaurants and plenty of daring water sports to try*”
- Guisborough is seen as “*relatively small, Guisborough offers plenty for the keen tourist to do. Gisborough Priory, Gisborough Hall and Saint Nicholas' Church are all worth a visit and the surrounding area provides plenty of opportunities for keen walkers, and the town is situated on the edge of the North York Moors National Park. For Evening entertainment try any of the local public houses or restaurants, and there is also a Rhythm and Blues Club for music lovers*”

A key issue, however, is that these descriptions are not accompanied by listings for things to do and see associated with the borough, or in terms of its assets appearing with specific visitor themes such as heritage attractions (3 references), outdoors (no references), family (1 reference – the Saltburn Golf Club), shopping (4 references), and sports (1 reference) for example.

To maximise the value of this association, the key features of the borough need to be highlighted and correctly assigned to the relevant categories.

Mini Rough Guide to Teeside

A 'Mini Rough Guide to Teeside' was published earlier this year. It illustrates a list of things to do especially in terms of shopping, music and entertainment, theatre, comedy, cinema, accommodation, and places to eat and drink.

The guide is on a number of websites including 'Visit Middlesbrough' and Teeside University but not on the RCBC website.

The main focus of the guide is on Middlesbrough, Stockton-on-Tees, and Darlington. The borough of Redcar and Cleveland is mentioned sporadically with a paragraph on both the towns of Redcar and Saltburn and further references to: the filming of Atonement, Bird watching, the beaches, Guisborough and some of the museums. There are instances where the borough is being under sold such as where Roseberry Topping is mentioned it is noted as its proximity to Middlesbrough rather than being in Redcar and Cleveland.

Further Developments Planned

Kirkleatham Estate

Image 4.4: Kirkleatham Estate

One further development opportunity that remains a priority is at the Kirkleatham Estate where there is an aspiration to improve the visitor experience within the timeframe of this VDP.

Kirkleatham Estate is a conservation area of considerable historic and architectural significance. It is already a visitor attraction for the borough, and includes a museum; a modern pavilion which is used for exhibitions and events; a special school for children with learning difficulties; a village that includes some unique Victorian railway cottages; a Church; and an occupied Alms House.

RCBC has identified an opportunity to deliver an improved and multifaceted experience based upon heritage. Although this will be subject to further investigation, RCBC has set out the following as potential projects:

- Restore buildings to teach heritage skills and crafts and enable young people to move into work, education or training;
- Restore the Stable Block and Walled Garden and bring back into sustainable use;
- Explore the development opportunities of the estate; and

- Develop new museum and gallery space.

A key benefit to this opportunity is that it has the potential to be used as a means of attracting different visitor audiences. The audit of existing amenities suggests that the area lacks a significant attractor within the heritage sector that can be used as a flagship. Kirkleatham Estate potentially has the capacity to act as such an attractor. At the time of writing there exists a great deal of uncertainty about the future of the Estate and the above may not come into fruition. However, it is important that the potential role of Kirkleatham is considered within the context of the VDP to ensure that any visitor-orientated re-development is appropriate to its strategic importance.

Coastal Communities Fund

The Coastal Communities Fund is a national programme aimed at encouraging the economic development of UK coastal communities by awarding funding to create sustainable economic growth and jobs. Grants of up to £10,000 in match-funding are available which can support tourism and leisure businesses in the borough. RCBC administers this scheme within the borough with a £250,000 fund available.

A scheme that is being developed using the Coastal Communities Fund is seven underground hobbit houses at the Liverton-based campsite, Golden Hill Farm. Inspired by the Hobbit Shire in JRR Tolkien’s Lord of the Rings novels, the development of this unique accommodation will be sympathetically landscaped and will present a unique underground living experience. Each house will look out to sea and have two bedrooms, a lounge, cooking facilities and a wood burning stove. The houses are designed to be wheelchair accessible.

This is an innovative development that, once completed, will conceivably be considered an attractor rather than just an accommodation development. The advantage of this proposal in terms of delivery is that it will form part of an existing enterprise. It is envisaged that the development will create 4 jobs.

Image 4.5: ‘Hobbit House’

CURRENT VISITORS AND ECONOMIC IMPACT

5. CURRENT VISITORS AND ECONOMIC IMPACT

5.1 Introduction

The following section provides a breakdown of the current visitor market. This includes the profile and perceptions of visitors, the economic impact and the employment supported.

5.2 Visitors

Data relating to Redcar and Cleveland is presented wherever possible as compared to other local authority areas that sit on the coast in Tees Valley, the North East, North Yorkshire and East Riding, Cumbria, Lancashire and Merseyside.

Day Visitors

Table 5.1 illustrates the number of Leisure Day Visits (lasting 3hrs or more) and Tourism Day Visits[27] to Redcar and Cleveland and the comparator areas.

Redcar and Cleveland attracts 1.8 million tourism day visitors per annum[28]. In terms of the Tees Valley, this is just above the number attracted to Darlington. Only Middlesbrough attracts more tourism day visitors.

The Tees Valley as a whole has fewer tourism day visitors than other coastal sub-regions in the north of England. For instance, the North Yorkshire and East Riding Sub-Region attracts around 21 million Tourism Day Trips. This compares to the 7.29 million in Tees Valley. It is recognised that the size of the sub-regions is a key factor in this, with North Yorkshire and East Riding being significantly larger than the Tees Valley.

Overnight Visitors

106,000 overnight trips were taken each year (between 2011 and 2013) to Redcar and Cleveland from other parts of the UK, equating to 334,000 nights per year worth £14 million. This is only above Hartlepool, Barrow-in-Furness and South Tyneside out of the comparator areas. However, the average number of nights stayed in Redcar and Cleveland (3.15 per trips) compares quite favourably to the other areas measured, with the average across all the comparator destinations being 2.92 nights.

The average expenditure per trip in Redcar and Cleveland is £132.10, this is about 25% less than the average (£176.40) across the comparator areas, as set out in **Table 5.2**. Expenditure in other parts of Tees Valley is considerably higher than Redcar and Cleveland, with the average value per trip being £217.80 in Hartlepool and £172.20 in Middlesbrough.

The lower expenditure in Redcar and Cleveland as compared to urban centres such as Liverpool or Middlesbrough is always likely to be higher. This is because of the stronger offers associated with retail and the evening economy, and also the higher values of inner-city accommodation. However, the average expenditure in coastal areas such as Scarborough and Blackpool are also much higher. This suggests a difference in the overall offer for Redcar and Cleveland.

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[27] Leisure Day Visits includes any trip taken locally for different types of leisure activity, including those taken regularly and by local residents. Leisure Day Visits can be important in supporting visitor services, especially attractions; however their activity is largely displaced. The value of highlighted Tourism Day Visits is that these are not undertaken on a regular basis and are defined as being outside of the visitor's usual environment. These trips are considered to be additional to the local area.
[28] On average, between 2011 and 2013

Table 5.1: Leisure and Tourism Day Visits (ordered by tourism day visits)

Local Authority	Sub-Region	Tourism Day Visits (million)	Leisure Day Visits (million)	Tourism Day Visits as % of Leisure Day Visits
Liverpool	Merseyside	14.50	25.79	56.2%
Northumberland	North Eastern	10.33	16.84	61.3%
Blackpool	Lancashire	9.08	13.05	69.6%
County Durham	North Eastern	8.97	15.31	58.6%
East Riding	North Yorkshire and East Riding	8.52	15.22	56.0%
Scarborough	North Yorkshire and East Riding	7.69	10.22	75.2%
South Lakeland	Cumbria	7.58	10.07	75.3%
Wirral	Merseyside	6.70	11.50	58.3%
Sefton	Merseyside	6.46	11.44	56.5%
Hull	North Yorkshire and East Riding	4.67	12.42	37.6%
Lancaster	Lancashire	3.90	5.40	72.2%
North Tyneside	North Eastern	3.78	6.68	56.6%
Allerdale	Cumbria	3.40	4.40	77.3%
Carlisle	Cumbria	2.96	5.54	53.4%
Wyre	Lancashire	2.65	4.05	65.4%
Middlesbrough	Tees Valley	2.39	6.86	34.8%
Sunderland	North Eastern	2.23	6.06	36.8%
Fylde	Lancashire	2.03	2.79	72.8%
Redcar and Cleveland	**Tees Valley**	**1.80**	**3.22**	**55.9%**
Darlington	Tees Valley	1.73	4.79	36.1%
Stockton-on-Tees	Tees Valley	1.37	2.49	55.0%
South Tyneside	North Eastern	1.34	2.84	47.2%
Copeland	Cumbria	1.08	1.53	70.6%
Hartlepool	Tees Valley	*	1.64	*
Barrow-in-Furness	Cumbria	*	*	*

Source: Great Britain Day Visitor Survey, 2011-13
**Data not available*

Table 5.2: Domestic Overnight Visitors (ordered by number of trips)

Local Authority	Overnight Trips (thousands)	Total Nights (thousands)	Total Spend (millions)	Average Number of Nights	Average Spend per Trip
Scarborough	1,687	5,630	£334	3.34	£198.0
South Lakeland	1,645	5,497	£375	3.34	£228.0
Liverpool	1,461	3,079	£256	2.11	£175.2
Blackpool	1,373	4,016	£278	2.92	£202.5
Allerdale	786	2,843	£150	3.62	£190.8
East Riding	785	2,498	£100	3.18	£127.4
County Durham	679	1,823	£98	2.68	£144.3
Lancaster	492	1,467	£73	2.98	£148.4
Sefton	361	973	£54	2.70	£149.6
Hull	354	851	£45	2.40	£127.1
Carlisle	275	659	£48	2.40	£174.5
Copeland	201	617	£33	3.07	£164.2
Sunderland	194	426	£27	2.20	£139.2
Darlington	175	461	£22	2.63	£125.7
Wirral	161	349	£12	2.17	£74.5
Middlesbrough	151	326	£26	2.16	£172.2
North Tyneside	138	348	£18	2.52	£130.4
Wyre	133	385	£13	2.89	£97.7
Fylde	127	372	£24	2.93	£189.0
Stockton-on-Tees	123	270	£12	2.20	£97.6
Redcar and Cleveland	**106**	**334**	**£14**	**3.15**	**£132.1**
Hartlepool	101	301	£22	2.98	£217.8
Barrow-in-Furness	75	299	£13	3.99	£173.3
South Tyneside	53	209	£6	3.94	£113.2
Northumberland	*	*	*	*	*

Source: Great Britain Tourism Survey, 2011-13
**Data not available*

Visitors from Overseas

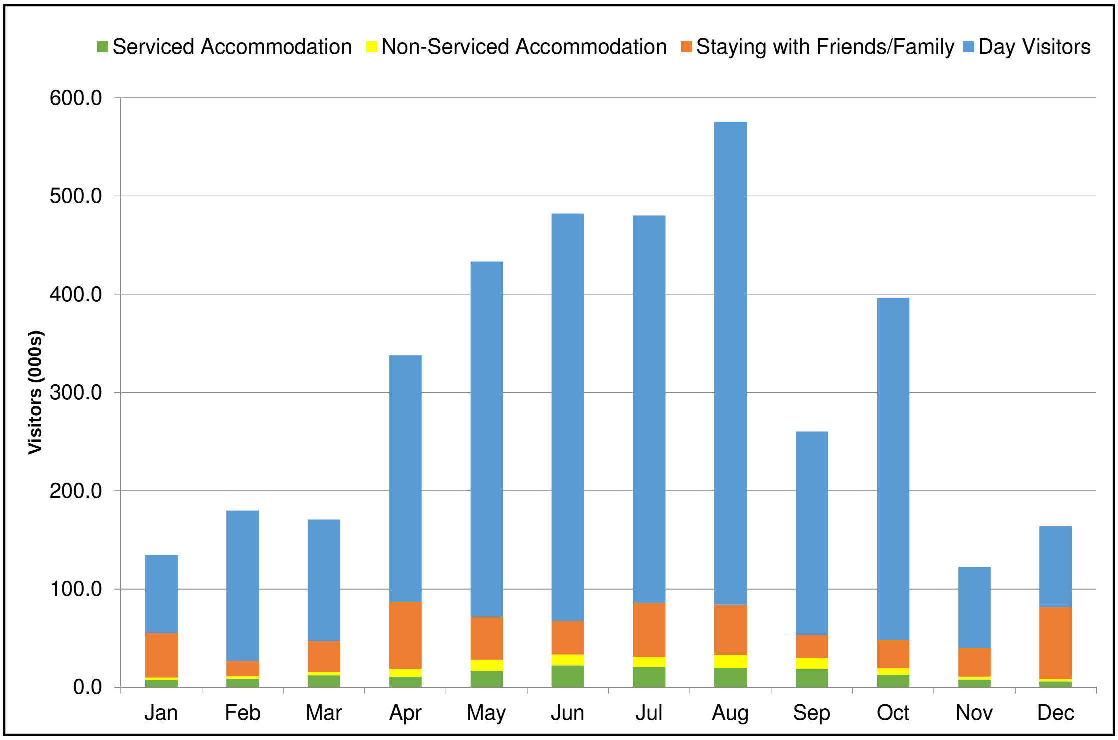
There were approximately 8,500 trips to Redcar and Cleveland from overseas visitors in 2013[29]. This represents an increase from almost 5,000 trips the previous year but lower than in 2011 (12,200 visitors). The reason for visiting the borough for the vast majority (86%) of overnight visitors was to visit family and friends. Of the remaining visitors, 6% were taking a holiday and the remaining 7% were there for business.

The origin of the overnight visitors is as follows: France (23%), Belgium (18%), Netherlands (16%), Greece (7%), USA (6%), Canada (4%), Spain (2%) and elsewhere (24%).

Seasonality

Figure 5.1 illustrates the spread of visitors throughout the year. As expected, visitor numbers are highest in the summer and peaks in August. Visitor numbers fall significantly in September, which highlights some seasonal issues. It is interesting to note a rise in day visitor trips in October and that those staying with friends and relatives are high in December and August. The proportion of visits using commercial accommodation (serviced and non-serviced) reflects the traditional seasonal pattern of tourism.

Figure 5.1: Visitor Profile by Month



Source: STEAM, 2012

[29] *Source: Office for National Statistics, International Passenger Survey, 2013*

Visitor Profile and Perceptions

A visitor perceptions study[30] for the borough highlights the following:

- Two-thirds (67%) of respondents had travelled from Tees Valley, 10% from Durham and 7% from Yorkshire.
- The main reason for visiting the area was for a 'day trip' (34%). This was followed by 'to shop' (21%) and 'visit friends or family' (20%). Relatively modest amounts visited 'to eat' (6%), 'to attend a specific event' (5%) or 'to visit a historic site / museum' (2%);
- The four most commonly visited attractions are in Saltburn. These are Saltburn Pier (73%), Saltburn Beach (71%), Saltburn Cliff Lift (62%), and Saltburn Valley Gardens (59%). Other popular attractions include; Redcar Beach (48%), Kirkleatham Museum (42%), Saltburn Miniature Railway (39%), and Redcar Beacon (36%);
- The majority of respondents (67%) had visited before;
- The most popular resource for planning the trip was the internet (37% of those who hadn't visited before), followed by word of mouth (26%);
- When asked if their visit lived up to expectations, 55% said it was 'as expected', 35% said 'better than expected' and 10% said it was 'worse than expected'. Almost 9 out of 10 (86%) said they would recommend the area to others.

Respondents were asked to rate a range of aspects relating to their visit as either: excellent, good, average or poor. **Table 5.3** summarises it in terms of likes (excellent or good) and dislikes (poor). The positive aspects generally relate to the key attractors, although the inclusion of customer service as a general like is encouraging. Conversely, the dislikes generally relate to supporting services and ambience factors. Whilst issues such as problems with car parking, street cleanliness and standard of toilets are not unusual for destinations, it is important that consideration is given to mechanisms which will improve the overall provision, standard and quality of such support services overall.

Table 5.3: Visitor Likes and Dislikes

Likes	Dislikes
Ease of getting around town (68%)	Range and quality of shops (40%)
The welcoming atmosphere (65%)	Car parking availability (33%)
Customer service (60%)	Car parking charges (28%)
Range of things to do (59%)	Cleanliness of streets (27%)
Cleanliness of beach (58%)	Standard of toilets (26%)

The business survey highlighted the most important drivers for visiting the borough are the countryside (4.79 out of 5), historic coast (4.47), range of visitor attractions (4.39), long distance walking trails (4.37), and traditional sun and sea beach holidays (4.32).

[30] *Evaluation of Redcar, Guisborough & Saltburn Visitor Perception Survey, Cara Pringle, November 2013*

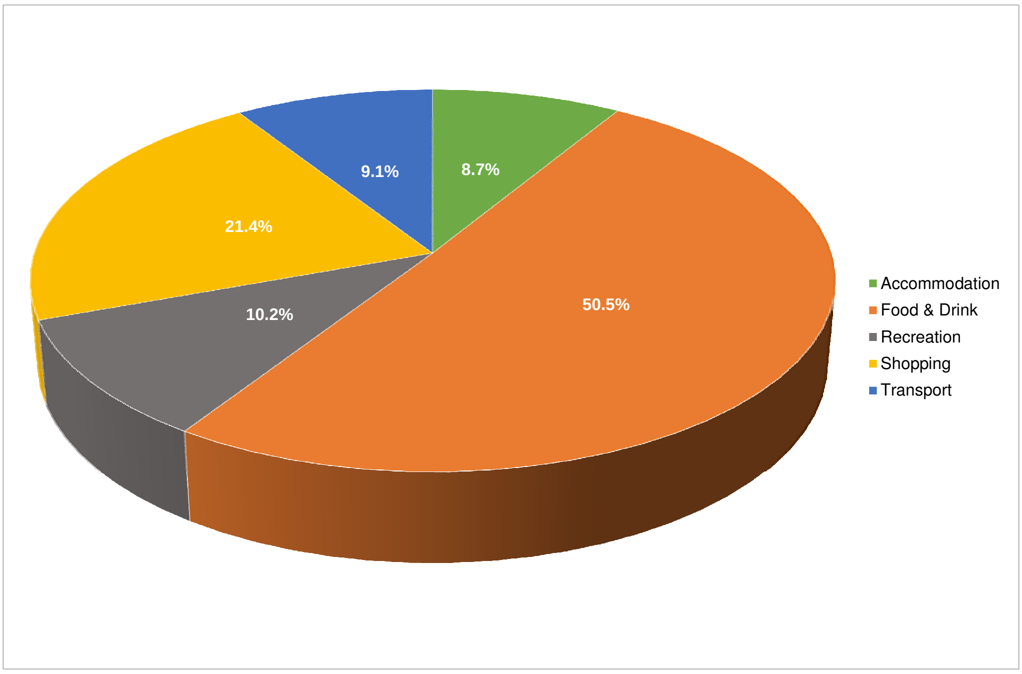
Likewise the survey suggests that the following are the key tourism facilities that are lacking locally: interpretation / signage (61.1%), more activities/attractions for family (50.0%), better quality attractions (44.4%), all weather attractions (38.9%), and evening entertainment (38.9%).

5.3 Economic

Economic Impact

Tourists to Redcar and Cleveland spent a total of £124 million in 2012. 63% of tourist revenue arose from direct expenditure, and 37% from indirect expenditure. **Figure 5.2** shows the breakdown of direct expenditure, the greatest proportion of which was on food and drink (50.5%), followed by shopping (21.4%).

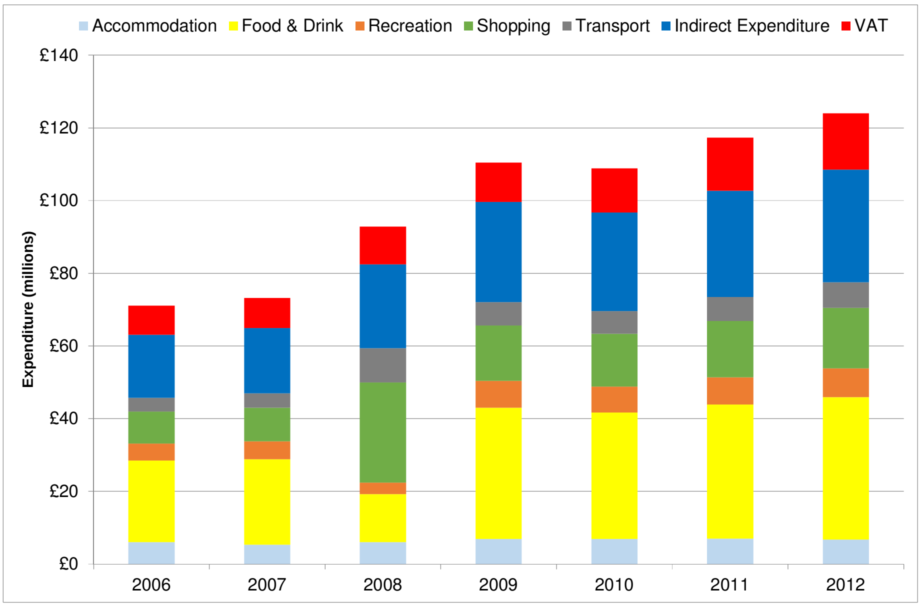
Figure 5.2: Breakdown of Direct Economic Impact



Source: STEAM, 2012

Figure 5.3 illustrates tourism expenditure from 2006 to 2012. With the exception of a slight fall between 2009 and 2010, the economic impact derived from visitors has been increasing. Overall tourism expenditure has grown by 74.4% with the largest sub-sector growth is transport (89.4%) and shopping (87.9%). All sub-sectors have demonstrated growth but accommodation (11.7%) is well below the categories.

Figure 5.3: Economic Impact by Sub-Sector, 2006 to 2012

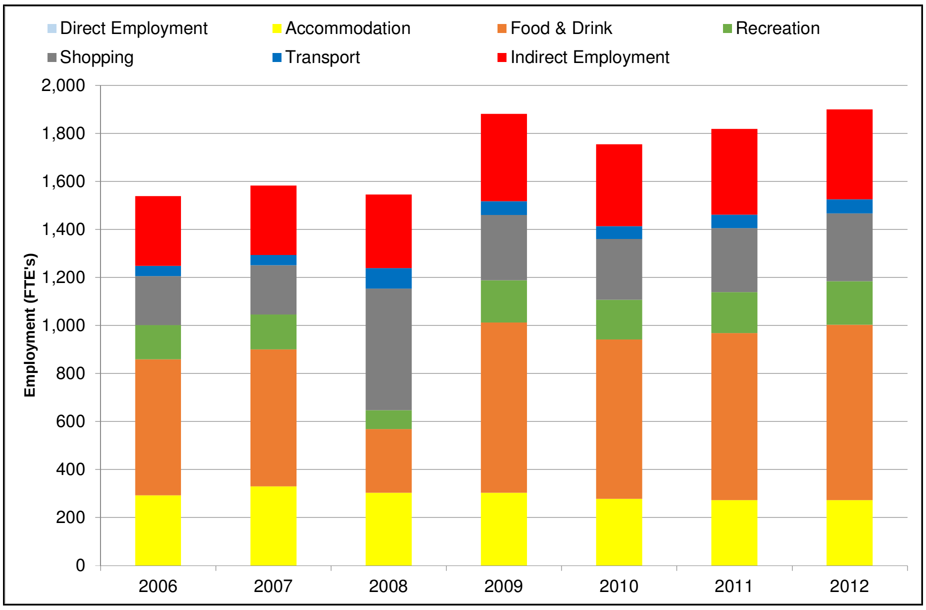


Source: STEAM, 2012

Employment

Approximately 1,900 FTE's are supported by visitor spend in Redcar and Cleveland. This is equivalent to 5% of all employment in the borough. **Figure 5.4** illustrates employment levels by sub-sector from 2006 to 2012. The greatest proportion of jobs is supported in food and drink (38.5%) with the fewest in transport (3.1%).

Figure 5.4: Employment by Sub-Sector, 2006 to 2012



Source: STEAM, 2012

SUMMARY

6. SUMMARY

The following summarises the baseline assessment.

6.1 Strategic Context

The key factors to consider when developing the VDP for Redcar and Cleveland include:

- Domestic tourism (staycationing) has strengthened in recent times, with the economic recession encouraging more of the UK population to holiday within the UK.
- People interested in overnight visits to the countryside are often attracted from relatively nearby (i.e. from within the region).
- Seasonality remains a predominant issue for seaside destinations. The economic impact from seaside trips are also not as high as other trips, however this is often counter-balanced by the longer durations of stay.
- There is an ever increasing volume of information accessible to visitors and different routes to market.
- Changing demography and social dimensions are leading to new opportunities, particularly in terms of different age groups and lifestages.
- There is an increasing share and value of disposable income being spent on recreation and culture[31] despite recessionary pressures.
- There is a continuing demand for value, with recessionary impacts reinforcing price as a driver although visitors still require a quality offer.
- The move towards healthier and more active lifestyles is increasingly being utilised by destinations as a means of establishing activity-orientated tourism products and packages

6.2 Local Context

Redcar and Cleveland already has a visitor profile which supports three distinct towns, and extensive coastal area, a range of heritage sites, and an important gateway to the North Yorkshire Moors National Park.

RCBC has recently made significant investments in delivering a series of regeneration projects that have the capacity to enhance the tourism offer. In turn, these projects are now providing a platform and catalyst through which the area can become established as a key destination for sub-regional and regional visitors.

The visitor market opportunity is clearly apparent. Over 13 million people reside within a 2hours drive of the area. In particular, Middlesbrough (138,900 population[32]) resides directly to the North West of the borough; Darlington (105,400) is just over 30 minutes' drive; and County Durham (516,000), Sunderland (276,100) and Newcastle (286,800) are roughly within a 60 minutes' drive. Moreover, there are excellent road transport links into and around Redcar and Cleveland.

[31] *ONS Consumer Spending data 2005-2012, Household Expenditure analysis*
[32] *Source: ONS, Mid-Year Population Estimates, 2013. Estimates are for local authority areas*

At a sub-regional level, the SEP identifies a series of objectives and activities which the VDP can make a real contribution toward. In doing so the VDP has the potential to support wider economic growth, investment and skills development.

The challenge for the VDP is to ensure that the broad market opportunities can be maximised by presenting clearly defined products and offers that have a defined visitor appeal. A key issue to resolve is the confusing identify and image of the area.

The borough is made up of three distinctive towns that all offer something different to visitors. From a visitor perspective they are disjointed and there is little in the way of thematic connections between them. Moreover, whilst the coastal landscape and attractive countryside are drivers known to motivate visitor arrivals, the associated characteristics of Redcar and Cleveland are better known in terms of the broader geographies of the Yorkshire Coast and the North Yorkshire Moors respectively.

Image 6.1: Walking in Redcar

6.3 Tourism Audit

The primary assets of the area relate to its landscape character (i.e. it coast and countryside) and the coastal and market towns of Redcar, Saltburn and Guisborough. These characteristics lend themselves to key activities such as walking, cycling, and water sports.

Key attractions in the borough include the Redcar Beacon, Redcar racecourse, Saltburn cliff lift, Saltburn pier, the range of museums, and in exploring local heritage and culture. Whilst these attractions provide enjoyable activities whilst in the borough, there is a question as to whether they are strong enough in character to draw significant volumes of visitors.

The supply of tourism accommodation is generally small-scale, with B&B's and guest houses being the main accommodation type and many are non-inspected. There is also a limited offer in terms of higher end hotels.

The leisure and entertainment offer has been greatly improved with the opening of the Redcar Leisure and Community Heart, whilst the Redcar Beacon forms a new focal point as well as an attraction for the coastal zone of the town. However, there is still a lack of a range in leisure provision that can be used to support and attract different visitors. Principal amongst these relates to centres to showcase performing arts and the quality of catering provision. This in turn is leading to a sense of their being a poor night time economy. This has implications for encouraging overnight stays on short trips and out-of-season visits.

The retail offer is characterised by its independent stores and markets, which from a tourism perspective is a positive feature. This is particularly true when linked to the historic and traditional market town characteristics of Saltburn and Guisborough. It is apparent, however, that retail and its relationship to driving different types of tourism markets are currently not being utilised. The quality and range of shops is seen by visitors as the biggest negative in terms of the borough as a visitor destination.

The borough hosts a high number of events throughout the year, however the relationship with tourism, encouraging visits, and extending the tourism season has yet to be fully developed. In this respect, a high proportion of events currently have a local focus. The events likely to have a tourism appeal are currently held in the summer months, which is already the peak time for tourism activity. There are mitigating circumstances, with the fact that these events are often outdoors meaning their success is linked to the weather. The summer period is usually more reliable in terms of bringing fine weather, and therefore the clustering of events during this time is understandable.

This points to a gap in events provision, namely the availability of an indoor events venue/arena.

The limited lack of tourism resource available is evident. This includes limited strategic sub-regional and regional infrastructure and promotion, a limited marketing budget, no TIC's, no 'brown signs', limited finger-pointing signs to move people around the borough, and a lack of car-parking nearby to attractions. Ultimately there is little to encourage any visitor to stay.

Kirkleatham Estate presents a development opportunity with the capacity to attract a different type of visitor. The uncertainty surrounding the site requires resolution, and in the context of the VDP there is certainly support for retaining the site as an attraction.

The use of Coastal Communities Fund in supporting the 'Hobbit' accommodation offers an example of how funds of this nature can be utilised to help the tourism sector innovate. Here, the uniqueness of the development itself is likely to encourage new visitors.

There exists a strong extreme sports offer which also presented a real opportunity for future development.

6.4 Current Visitors and Economic Impact

The visitor profile for Redcar and Cleveland is dominated by Tourism Day Visitors (94%), with the overnight visitor sector accounting for the remaining (6%). Of the overnight trips, 66.7% are staying with friends and family, with 21.9% staying in serviced accommodation and 11.4% in non-serviced. Overseas visitors have a particularly strong relationship with visits to friends and family.

The borough is able to attract longer staying visitors compared to other areas within the Tees Valley sub-region. This is partly being driven by its coastal assets, with the monthly visitor patterns demonstrating seasonality. However, other evidence suggests that this is also partly being driven by the high proportion of contract workers using commercial accommodation whilst working in the area. This may help to explain the low levels of spend being used to support attractions/recreation.

In the main, visitors are satisfied with their visit to the borough with a high number of repeat visits and a strong indication of recommendations. Visitors are particularly satisfied with the ease of getting around (potentially due to the decent road network / lack of congestion), the welcoming feel and customer service, the range of things to do and the clean beach. However, there is some dissatisfaction displayed in relation to supporting amenities (i.e. car parking availability and charges, the toilets), the general ambience (i.e. unclean streets) and the quality and range of retail.

With the visitor economy worth around £124 million and supporting around 1 in 20 jobs in the borough, it is clear that the visitor sector is a valuable economic activity within Redcar and Cleveland. It is also one that has yet to reach its full potential.

Image 6.2: Extreme Sports

APPENDIX

APPENDIX A ANALYSIS OF TRIPADVISOR

The following provides a summary of a search conducted for each of the three key areas within Redcar and Cleveland on TripAdvisor.

A search for 'Redcar' firstly brings up a welcoming picture of Kirkleatham Museum. However, only, 9 attractions and 14 accommodation providers are listed. The 9 'attractions' are set out in **Table A.1** along with the average satisfaction score. The 'attractions' are however nominal in that they also include two pubs, a therapy centre and aromatherapy unit.

However, satisfaction levels with the attractions are generally high especially for the Zetland Lifeboat Museum, the Owl Centre and Kirkleatham Museum.

Table A.1: Attractions in Redcar and Satisfaction (where 5 is the highest)

Attraction	Number of reviews	Average score (out of 5)
O'Gradys	1	5.0
Zetland Lifeboat Museum	28	4.8
Sushannah's Angels	6	4.7
Kirkleatham Owl Centre	42	4.5
Kirkleatham Museum / Saxon Princess Exhibition	77	4.3
Plimsoll Line	1	4.0
Redcar Beacon	113	3.0
The Livery Redcar	2	2.5
Hands & Oil Aromatherapy	1	1.0

Source: Tripadvisor, September 2014

A search for 'Saltburn' brings up a similar first impression as Redcar with an impressive picture of the Cliff Lift looking down on to the sea. The number of associated 'attractions' is 8 and the number of accommodation providers is 16. Of the 8 attractions shown, only 5 have received reviews but the scores are very high.

Table A.2: Attractions in Saltburn and Satisfaction (where 5 is the highest)

Attraction	Number of reviews	Average score (out of 5)
Flow Surf School	18	5.0
The Play Factory	15	4.7
Saltburn Cliff Lift	43	4.7
Saltburn Pier	212	4.5
Arts Bank	17	4.0
Ripping Yarns	0	-
Amber Room	0	-
Valley Adventures	0	-

Source: Tripadvisor, September 2014

A search for 'Guisborough' brings up an image of a street map with 6 'attractions' highlighted and 7 accommodation providers. The six attractions are illustrated in **Table A.3**, with only 5 receiving reviews. Again, the reviews received are very good.

Table A.3: Attractions in Guisborough and Satisfaction (where 5 is the highest)

Attraction	Number of reviews	Average score (out of 5)
SkyBlueRed Studio	3	5.0
The Ship Inn	1	5.0
My Serenity	12	4.7
Guisborough Forest	5	4.2
Gisborough Priory	27	4.0
The Priory Bar	0	-

Source: Tripadvisor, September 2014

Redcar and Cleveland Visitor Destination Plan

Action Plan

Document 2 of 3

November 2014

REDCAR & CLEVELAND BOROUGH COUNCIL

URS

Rev	Date	Details	Prepared by	Checked and approved by
1	27th October 2014	DRAFT Action Plan	Kevin Duxbury (Project Manager) and Barry Woodfin (Tourism and Leisure Consultant)	Bob Perkins (Project Director)
2	28th November 2014	Action Plan	Kevin Duxbury (Project Manager) and Barry Woodfin (Tourism and Leisure Consultant)	Bob Perkins (Project Director)

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ACRONYMS

Acronym	Meaning
BETA	British Equestrian Trade Association
BFSLYC	British Federation of Land and Sand Yacht Clubs
BKSA	British Kitesurfing Association
BLF	Big Lottery Fund
DMO	Destination Management Organisation
FRED	Friends of Redcar
FTE	Full-Time Equivalent
GB DVS	Great Britain Day Visitor Survey
GB TS	Great Britain Tourism Survey
HLF	Heritage Lottery Fund
IPS	International Passenger Survey
LEP	Local Enterprise Partnership
LNR	Local Nature Reserve
NCN	National Cycle Network
NTO	National Trail Office
ONS	Office for National Statistics
RCBC	Redcar and Cleveland Borough Council
RDPE	Rural Development Programme for England
SEP	Strategic Economic Plan
STEAM	Scarborough Tourism Economic Activity Monitor
SWOT	Strengths, Weaknesses, Opportunities and Threats
TIC	Tourist Information Centre
TVU	Tees Valley Unlimited
VDP	Visitor Destination Plan

INTRODUCTION

1. INTRODUCTION

1.1 Overview

URS was commissioned to undertake a Visitor Destination Plan (VDP) for Redcar and Cleveland. The VDP provides a shared vision and framework for the future development of the visitor economy in the area up to 2020.

The VDP provides the framework and a rationale for further investment setting out specific actions that partners can work together on to further develop the visitor, tourism and leisure economy in Redcar and Cleveland.

It articulates the roles of different stakeholders and identifies clear actions on how the area can attract further visitors and maximise the economic benefit created. The VDP links to other local and sub-regional initiatives and strategies and requires the support of stakeholders at the local, sub-regional and inter-regional level to be a success.

This is the second of three documents that make up the VDP.

1.2 Aims of VDP

The aims of the VDP are to:

- Review and understand existing markets, visitor types and competition;
- Identify potential growth sectors and identify any barriers;
- Draw comparisons and lessons from other relevant destinations;
- Identify actions that link visitor economy activity with current strategies and funding sources; and
- Produce an indicatively costed and timed action plan targeting growth opportunities and markets and providing a steer for future investment in the borough.

1.3 Approach

For the VDP to be a success it is important that all relevant stakeholders are engaged. The approach adopted for the VDP includes a range of both primary and secondary research to capture the views of relevant stakeholders in the borough as well as the sub-region, region and national levels. The VDP brings together these views in one coherent document.

The approach to the work included:

- A review of national research, policy and strategy;
- A number of visits to key towns, villages and attractions in Redcar and Cleveland;
- An assessment of local data, policy and strategy including marketing material, visitor numbers and research, company websites, the events programme and STEAM[1];
- An examination of tourism and marketing websites including Welcome to Yorkshire, Visit England, Trip Advisor and British Destinations;

[1] *STEAM (Scarborough Tourism Economic Activity Monitor) is a model for measuring local tourism activity*

- Telephone and face-to-face interviews with 20 stakeholders from RCBC, Tees Valley Unlimited, local visitor attractions, neighbouring local authorities, North York Moors, Welcome to Yorkshire, and Visit England;
- An electronic business survey which was completed by 24 organisations that provide tourism accommodation or are visitor attractions. The full results from the business survey are presented in **Document 3**; and
- Three workshops with stakeholders from accommodation providers, restaurants, visitor attractions, town and parish councils.

A list of the organisations who have participated is set out in **Document 3**.

1.4 Suite of Documents

This is the second of three documents that make up the VDP. The following sets out the content of each.

Document 1: Baseline:

- **Provides the strategic context** for the VDP by assessing relevant trends to provide an understanding of which factors could influence visitor behaviour in Redcar and Cleveland;
- **Sets out the local context** providing an overview of the key towns and wider catchment, alongside the political, transport, natural environment, heritage, and cultural contexts;
- **Presents an audit of the tourism and visitor economy** which includes accommodation providers, visitor attractions and activities, leisure facilities, neighbouring attractions, events, festivals and activity in complementary sectors; and
- **Profiles the current visitor market** and presents a statement of their economic impact.

Document 2: Action Plan:

- **Provides a summary of the baseline** in the form of a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis.
- **Establishes the direction of the VDP** by highlighting the overarching principles, a vision statement and high level objectives;
- **Details the specific actions, responsibilities and resources** to support growth and development in the visitor economy, based upon the previous analysis; and
- **Sets out a framework and process for monitoring the progress** and success of the VDP and identifies potential funding sources.

Document 3: Supporting Information:

- **Highlights good practice and lessons learned from elsewhere** in relation to the potential growth markets for the Redcar and Cleveland visitor economy.
- **Presents the results of the business survey;** and
- **Details the stakeholders who have contributed** towards the VDP.

BASELINE SUMMARY

2. BASELINE SUMMARY

2.1 SWOT

Document 1 established the baseline for the VDP. **Table 2.1** summarises this in the form of a SWOT analysis. The strengths and weaknesses relate to the destination as it stands, whereas, the opportunities and threats refer to the context and largely external.

The Action Plan seeks to build upon the strengths, address the weaknesses, pursue the opportunities and minimise the impacts of the threats.

Table 2.1: SWOT Analysis

Theme	Strengths	Weaknesses
Existing assets	Kirkleatham / Seafront / Racecourse / Cleveland Way / Skinningrove / Outdoor activities / Museums representing local heritage and culture / Saltburn Cliff Lift / Leisure and Community Heart / Gisborough Priory and Hall Market towns with independent retailers Diversity / variety of offer Relatively high level of satisfaction from existing visitors Recent investment in new attractions Growing number of events	Existing attractions are comparatively modest / area lacks significant commercial attraction/attractor/pull (e.g. zoo, estate, theme park) Limited indoor offer such as no internal shopping areas / retail offer more generally Limited tourism accommodation offer Poor evening economy Events programme is unstructured Internal competition and perception that interests in different areas are the priority Poor/limited car parking or far from facilities
Geography	Quality of coastal and countryside environment combining with market towns and coastal resorts Access to markets – geographic position in relation to population/conurbations Good road networks to and around borough / lack of congestion Not densely populated	Lack of identity or destination profile/brand linked to key environmental assets Poor perception of area Strength of other nearby destinations – e.g. North Yorks Moors, Whitby, Scarborough
Market	Strong day visitor market Some evidence of market diversity (e.g. traditional family, growing activity market, business) Strong satisfaction levels amongst existing visitors High propensity to return/re-visits/recommend	Low overnight visitor market, particularly in terms of leisure visitors using commercial accommodation Seasonality associated with coastal offer Lower socio-economic profile so less money to spend on leisure and tourism Limited dwell time of visitors Market diversity still not maximised
Support and collaboration	RCBC support / ambition for the visitor sector Some links and collaboration with Hartlepool Council Ambition from other partners to engage	No Destination Management Organisation Lack of sub-regional support – LEP and limited partnership across the area Lack of resources/staff for visitor/leisure development and co-ordination of investment in these areas

Business / supply	Sector largely consists of local enterprises of a small and medium scale Large number of well-established businesses	Negative perception internally of visitor sector Business partnerships could be stronger Lack of entrepreneurial activity Many existing businesses are 'lifestyle' businesses which are more susceptible to changing circumstances
Marketing / promotion	Existing online presence Some published material – e.g. brochure, leaflets	Lack of information/approach to information Marketing approach / budget – need to develop Lack of use of social media / apps

Theme	Opportunities	Threats
Specific activities	Kirkleatham Estate – heritage led tourism project Cleveland Way – route segmentation/accommodation (e.g. camping pods) along route Events – more structure / promotion / utilisation of assets to be used by partners / private sector (e.g. the beach) Industrial heritage Extreme sports - dedicated centres/hubs Large audience at racecourse / extend stay	Stronger competition from other areas Loss of trade/business and impact upon diversity of economy Current and potential future visitors going elsewhere
Partnerships/ Marketing / Brand Development	Locally – need to improve relationship with businesses strategically, greater use of Friends of Redcar (FRED) Sub-regionally - link up with other local authorities (extend outside the sub-region where appropriate) Regionally – engage with tourism networks such as North York Moors Tourism Network, Welcome to Yorkshire Nationally – engage with Visit England, British Destinations	RCBC becomes isolated Poor perceptions of the borough become perpetuated through user-generated content websites such as Trip Adviser
Wider trends	Technology - Information and distribution – social media apps / better profile and promotion – more innovative use of marketing channels Staycations Diversity of needs from increasingly diverse population including older population with disposable income, recent and ongoing baby boom with activities for young families Increased awareness in health related activities / increasing popularity of cycling	Funding climate Companies from Town centres – M&S moving out/High Streets Rents for Town centres/Vibrancy of town centres Technology not being used/maximised – 'destination' being left behind
Geography	Trying to capture more expenditure from local residents Large catchment – unrealised potential Located close to other large attractions/ destinations	Continued lack of identity/awareness of R&C

SETTING THE FUTURE DIRECTION

3. SETTING THE FUTURE DIRECTION

3.1 Introduction

This section sets out the overall principles and aims of the VDP, identifies the target markets, growth areas and sets out a vision statement, strategic objectives and related targets.

The timeframe and existing conditions pose a number of significant challenges to the visitor and tourism sector and the economy as a whole. It is important that the Action Plan has ambitious but achievable goals in the period up to 2020 but focuses on specific actions within the initial five year period.

3.2 Overarching Principles and Aims

The approach to the visitor and tourism economy in Redcar and Cleveland should be governed by the overarching principles and aims set out below. This is based on findings from the investigation process, feedback from consultations (as summarised in **Appendix B**), and Visit England guidance in developing a destination.

Support Wider Economic Development

Although the VDP is focussed on actions targeting the tourism and visitor economy, it must link in and support the wider economic development agenda in Redcar and Cleveland. The VDP should be promoted in terms of how the visitor sector benefits the residents and workers of Redcar and Cleveland rather than specifically the visitors. In this respect, the local community will benefit from a greater access to leisure and tourism assets and events, creating a wide range of job and training opportunities and increase the footfall for existing businesses. Ensuring the local community are well engaged in the delivery of the VPD will greatly enhance its successful delivery and ensure that economic growth within the borough is achieved.

Fit with Policy

The policy context is summarised in **Appendix A**. Important policy drivers within the borough include the Redcar and Cleveland Regeneration Masterplan and the draft Local Plan.

An aspiration of the Regeneration Masterplan is to achieve 1.7 million additional visitors and £20 million additional expenditure per annum at the end of the 15 year period. This VDP needs to, as a minimum, build a successful platform to achieve this.

Other important opportunities are highlighted in the draft Local Plan such as the regeneration allocation of Coatham. The forthcoming masterplan will set out specific development opportunities with a focus on diversifying the products on offer. There is real opportunity to develop a product with a regional draw here, such as an extreme sports centre.

Likewise, there are a number of specific policy ‘hooks’ identified within the LEP’s SEP that provide other opportunities to support growth and make a return for the sub-region.

Themed Approach around Realistic Growth Areas

Redcar and Cleveland has the foundations upon which a more coherent and prosperous visitor sector can be envisaged, but achieving that potential will require a long term approach. Key themes/growth areas upon which to build have been determined through the investigation and consultation process as being:

- Outdoor activities (walking, cycling and equestrian);
- Extreme sports (both outdoor and indoor);
- Events/festivals;
- Heritage and culture; and
- Coastal offer.

Image 3.1: Local Heritage

Due to the lifespan of the VDP, the Action Plan identifies some 'easy wins' that will raise the profile of the area within each theme through to more ambitious development options which, if delivered, could ultimately lead to step changes in the position of Redcar and Cleveland's visitor economy.

These themes have been developed and assessed in relation to the wider market context and demand position, best practice from elsewhere and lessons learned from previous activities in Redcar and Cleveland. This is illustrated in **Document 3**.

Essential Supporting Infrastructure

The tourism audit and consultation process has highlighted the need for a better food and drink offer, a greater quantity and quality of tourism accommodation, indoor provision, and improved public transport links. These are essential in terms of increasing the length of stay of visitors as well as attracting new visitors.

The short-term focus of the Action Plan in terms of supporting infrastructure is to support existing services, other than where there is clear opportunity to develop either a new or growing market area (e.g. extreme sports, arts and culture). Both the investigation and the consultation process has determined that improving the quality of the offer and tailoring the customer service more closely to the current visitor markets is the priority at this stage.

As the capacity within each of the key themes develops, there will be opportunity for other services to be developed and introduced (i.e. accommodation, catering services, retail, etc.). These services should be aimed at raising the overall experience of the visitor. Concept development and training support is envisaged to ensure that the service opportunity, whether from the commercial or voluntary sector, has a sustainable future.

Realism and Partnership Approach

The VDP needs to establish an achievable and aspirational framework that can deliver sustainable benefits to the visitor economy. The VDP needs to be based on a partnership approach to delivery and leveraging funding from other sources.

Benefiting and Linking into the Wider Tourism Offer

Redcar and Cleveland should look to 'piggyback' on the success of other nearby destinations rather than go it alone. We have divided the local authority into distinct character areas based predominantly around the key towns. The character areas and their associated destinations are:

1. Guisborough and the surrounding rural hinterland with North York Moors

2. Saltburn, Redcar, Marske-by-the-Sea and the surrounding areas with Yorkshire Coast

It will be important that the assets of Redcar and Cleveland are represented in these wider areas. The role of RCBC and its stakeholders will be to ensure this happens.

Sustainability

Sustainability is a key consideration for any destination plan, but particularly where the natural environment is a regarded as one of the primary assets. With its varied coastline, attractive countryside and engaging market towns, it is important that the Action Plan gives consideration about potential impacts on the visitor economy, local community, the character of the environment, and the mix between different visitor groups.

The VDP will impact upon the local community of Redcar and Cleveland, with some evidence through the consultation process suggesting that the impacts can divide opinion. It is incumbent upon the stakeholders of the VDP to ensure that the visitor economy is suitably managed to ensure positive impacts whilst minimising negative impacts, particularly disruption to local lives and routines.

Embrace the Creative Side

Another strength highlighted throughout the consultation process is the large pool of creative, artistic and entrepreneurial talent, activities and ideas in the borough. This offers a unique selling point that should be built upon. For example through reflecting these characteristics and ideas in the marketing of the area and the attractions and events it has to offer.

3.3 Key Target Markets

The mix of target markets over the next five years is not dissimilar to what it is now but the focus will be on leveraging additional benefits and extending the reach into these markets (towards the end of the VDP timeframe), for example:

- Greater concentration of people travelling from 30 to 60 minutes' drive;
- Greater retention of local residents and visitors to friends and relatives' in terms of leisure activities and associated expenditure;
- Increased value from existing visitors by extending the overall offer, for example, encouraging families to use facilities beyond the coastal zone;
- Some shift in the socio-economic profile of new visitors i.e. attracting audiences known to have more disposable income to spend;
- Translating some of the day visitors to overnight stays by improving evening economy assets;
- Growth themes (as identified earlier)

Image 3.2: Kite Surfing in Redcar

3.4 Vision Statement

By 2020, Redcar and Cleveland will be well-known as offering an excellent quality of life for residents, workers and visitors alike. People will be attracted by the distinctiveness of its past heritage as well as its sustainable outlook. It will be a hub for extreme sports and other outdoor activities and will be used as a base for families visiting the wide array of attractions in and around the borough.

Redcar and Cleveland will have a well-structured and well-publicised events programme that has something for all residents and visitors throughout the year. It will be starting to attract significant private sector interest and investment in new and niche tourist accommodation, food and drink outlets and retail. People will move freely and easily in and around the main towns as well as out to the rural parts of the borough.

3.5 Targets and Objectives

Table 3.1 illustrates targets for Redcar and Cleveland in 2020. This is based on the 'do more' scenario as set out in **Section 4.3** and assumes that all or the vast majority of the actions in **Section 4.4** are taken forward. **Figures 4.1** and **4.2** (below) illustrate how the targets compare to the other scenarios.

Table 3.1: VDP Targets Based on 'Do More' Scenario (2015 to 2020)

Indicator	Baseline	% change to 2020	Target in 2020*
Total tourists, of which:	3.3 million	20%	4.0 million
Day visitors (including leisure visits)	3.0 million	21%	2.16 million
Overnight visitors (including staying with friends and family)	312,000	10%	343,000
Tourism expenditure	£124 million	25%	£155 million
Tourism related employment (FTE's)	1,800	20%	2,260

**figures may not sum due to rounding*

Section 4 sets out the most significant actions that should be delivered over the next five years. The actions centre on a range of objectives presented under the following key themes:

1. **Partnerships, Engagement, Marketing and Image**
   - Strengthening the areas identity & profile as an attractive visitor destination
   - Better promotion / more joined-up promotion of attractions and activities in the borough (around growth themes)
   - Improving the collaboration with the existing business community in order to share knowledge, help improve the visitor destination offer and jointly deliver actions
   - Improve engagement with other local, regional and national partners

Image 3.3: Local Arts and Crafts

2. **Infrastructure and Environment**
   - Broadening and improving the accommodation offer
   - Improving the quality of the food and drink and evening economy offer
   - Ensuring the retail offer meets the needs of growth markets (e.g. supporting services for extreme sports)
   - Encouraging more sustainable travel around the borough
   - Embrace sustainability
3. **Tourism Product and Experience**
   - Establish Redcar and Cleveland as a year round destination
   - Increasing the number of visitors and length of stay
   - Improving the visitor experience to ensure repeat visits
   - Increasing private sector investment/involvement in events organisation and delivery

Redcar and Cleveland Visitor Destination Plan

Supporting Information

Document 3 of 3

November 2014

Rev	Date	Details	Prepared by	Checked and approved by
1	27th October 2014	DRAFT Supporting Information	Kevin Duxbury (Project Manager) and Barry Woodfin (Tourism and Leisure Consultant)	Bob Perkins (Project Director)
2	14th November 2014	Baseline report	Kevin Duxbury (Project Manager) and Barry Woodfin (Tourism and Leisure Consultant)	Bob Perkins (Project Director)

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ACRONYMS

Acronym	Meaning
BETA	British Equestrian Trade Association
BFSLYC	British Federation of Land and Sand Yacht Clubs
BKSA	British Kitesuring Association
BLF	Big Lottery Fund
DMO	Destination Management Organisation
FRED	Friends of Redcar
FTE	Full-Time Equivalent
GB DVS	Great Britain Day Visitor Survey
GB TS	Great Britain Tourism Survey
HLF	Heritage Lottery Fund
IPS	International Passenger Survey
LEP	Local Enterprise Partnership
LNR	Local Nature Reserve
NCN	National Cycle Network
NTO	National Trail Office
ONS	Office for National Statistics
RCBC	Redcar and Cleveland Borough Council
RDPE	Rural Development Programme for England
SEP	Strategic Economic Plan
STEAM	Scarborough Tourism Economic Activity Monitor
SWOT	Strengths, Weaknesses, Opportunities and Threats
TIC	Tourist Information Centre
TVU	Tees Valley Unlimited
VDP	Visitor Destination Plan

INTRODUCTION

1. INTRODUCTION

1.1 Overview

URS was commissioned to undertake a Visitor Destination Plan (VDP) for Redcar and Cleveland. The VDP provides a shared vision and framework for the future development of the visitor economy in the area up to 2020.

The VDP provides the framework and a rationale for further investment setting out specific actions that partners can work together on to further develop the visitor, tourism and leisure economy in Redcar and Cleveland.

It articulates the roles of different stakeholders and identifies clear actions on how the area can attract further visitors and maximise the economic benefit created. The VDP links to other local and sub-regional initiatives and strategies and requires the support of stakeholders at the local, sub-regional and inter-regional level to be a success.

This is the third of three documents that make up the VDP. See **Section 1.4** for more details.

1.2 Aims of VDP

The aims of the VDP are to:

- Review and understand existing markets, visitor types and competition;
- Identify potential growth sectors and identify any barriers;
- Draw comparisons and lessons from other relevant destinations;
- Identify actions that link visitor economy activity with current strategies and funding sources; and
- Produce an indicatively costed and timed action plan targeting growth opportunities and markets and providing a steer for future investment in the borough.

1.3 Approach

For the VDP to be a success it is important that all relevant stakeholders are engaged. The approach adopted for the VDP includes a range of both primary and secondary research to capture the views of relevant stakeholders in the borough as well as the sub-region, region and national levels. The VDP brings together these views in one coherent document.

The approach to the work included:

- A review of national research, policy and strategy;
- A number of visits to key towns, villages and attractions in Redcar and Cleveland;
- An assessment of local data, policy and strategy including marketing material, visitor numbers and research, company websites, the events programme and STEAM[1];
- An examination of tourism and marketing websites including Welcome to Yorkshire, Visit England, Trip Advisor and British Destinations;

[1] *STEAM (Scarborough Tourism Economic Activity Monitor) is a model for measuring local tourism activity*

- Telephone and face-to-face interviews with 20 stakeholders from RCBC, Tees Valley Unlimited, local visitor attractions, neighbouring local authorities, North York Moors, Welcome to Yorkshire, and Visit England;

- An electronic business survey which was completed by 24 organisations that provide tourism accommodation or are visitor attractions. The full results from the business survey are presented in **Document 3**; and

- Three workshops with stakeholders from accommodation providers, restaurants, visitor attractions, town and parish councils.

A list of the organisations who have participated is set out in **Document 3**.

1.4 Suite of Documents

This is the third of three documents that make up the VDP. The following sets out the content of each.

Document 1: Baseline:

- **Provides the strategic context** for the VDP by assessing relevant trends to provide an understanding of which factors could influence visitor behaviour in Redcar and Cleveland;

- **Sets out the local context** providing an overview of the key towns and wider catchment, alongside the political, transport, natural environment, heritage, and cultural contexts;

- **Presents an audit of the tourism and visitor economy** which includes accommodation providers, visitor attractions and activities, leisure facilities, neighbouring attractions, events, festivals and activity in complementary sectors; and

- **Profiles the current visitor market** and presents a statement of their economic impact.

Document 2: Action Plan:

- **Provides a summary of the baseline** in the form of a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis.

- **Establishes the direction of the VDP** by highlighting the overarching principles, a vision statement and high level objectives;

- **Details the specific actions, responsibilities and resources** to support growth and development in the visitor economy, based upon the previous analysis; and

- **Sets out a framework and process for monitoring the progress** and success of the VDP and identifies potential funding sources.

Document 3: Supporting Information:

- **Highlights good practice and lessons learned from elsewhere** in relation to the potential growth markets for the Redcar and Cleveland visitor economy.

- **Presents the results of the business survey;** and

- **Details the stakeholders who have contributed** towards the VDP.

COMPARATOR ASSESSMENT OF GROWTH AREAS

2. COMPARATOR ASSESSMENT OF GROWTH AREAS

2.1 Introduction

This section highlights lessons learned from elsewhere in relation to the potential growth areas of the borough. The purpose of the assessment is to examine the methods and initiatives that destinations elsewhere have sought to deliver as a means of encouraging new visitors, addressing quality issues, and broadening their visitor offer. The findings of this assessment are summarised in terms of the product, market potential, and future development needs/opportunities of Redcar and Cleveland as identified through the baseline assessment and consultation programme.

Four key themes have been identified that offer the greatest potential for growth. These are:

- Outdoor activities in terms of:
  - Walking
  - Cycling
  - Horse Riding
  - Extreme Sports (but also including indoor)
- Events/festivals;
- Heritage; and
- Coastal offer.

2.2 Walking

Market Context

Walking can be one of the most rewarding ways to explore a destination. The activity generally does not involve significant expenditure, expertise, or experience. It allows access to more remote places and spaces, and can be used as a means of escapism in itself. It is also regarded as a green and a culturally engaging means of exploration.

9.1 million (22%) of adults in England walk recreationally for at least 30 minutes every 4-weeks, which is the same proportion as swimming and cycling combined. In addition, walking ties with eating out as the most popular type of day trip undertaken by UK residents, with the countryside (36% of walks) and the coast (33%) being the most popular places to undertake a walk[2].

Ramblers UK suggest that despite its popularity, walking has significant growth potential. They draw reference to the fact that European countries generally have higher walking levels than in the UK. Specific barriers to walking noted by Ramblers UK include:

- Lack of time;
- The weather;
- Unattractive walking environments;
- Fears for safety and personal security;
- Lack of knowledge of the walking environment and/or the benefits and ease of walking;
- Lack of motivation; and
- Inaccurate information on trails and their difficulty.

Comparator Areas

As a result of this demand, many rural and coastal destinations now include walking as an integral part of the tourism experience. Moreover, walking tourism is being actively pursued, encouraged and supported by a variety of initiatives.

In general terms, the advantages of providing for walkers at a destination level is that development generally requires lower capital investment when compared with many other activities and yet it has the ability to attract a more significant number of visitors.

Walking tourism also encourages more sustainable movement around the destination; it allows more remote and peripheral places to become accessible to visitors, spreading their benefits; it can be used to extend the tourism season beyond the traditional summer months; and it can be used to encourage greater interaction between tourists and more remote businesses and communities.

Analysis of the benefits of key walking destinations and trails are summarised below:

- The Highlands and Islands of Scotland is now arguably one of the most popular destinations for walking in the UK, attracting well over 1 million walking trips. The Fife

[2] *Ramblers UK (2013)*

Coast Path alone is estimated to be worth between £24 million and £29 million, with overall walking tourism worth £245 million[3].

- The Brecon Beacons is estimated to have 3,850 km of access pathways, the majority of which are Public Rights of Way. The value of walking tourism is estimated to range from £25 million to £31.2 million per annum[4].
- England's South West Coast Path (SWCP), at 630-miles, is the longest National Trail in England and is also one of the most high profile walks, featuring as one of the 'World's Great Walks'. Completing the trail in one go would take 8 to10 weeks, however most users complete smaller sections on either day or multi-day trips, with some completing the route over many years. The SWCP generates around £300 million per annum, supporting 7,500 jobs.
- El Camino de Santiago is a major Christian Pilgrimage route that is over 1,000-years old with the end destination being Santiago de Compostela in north west Spain. More than 100,000 people walk the Camino Frances, each year, as a multi-day tour. The walk generates approximately €30 million.

Lessons Learned

The audit has revealed that Redcar and Cleveland is already well catered for in terms of its walking offer. Fundamentally, it has a significant asset for walking in the form of the Cleveland Way, a National Trail. The trail is promoted nationally and has a dedicated section on the National Trail Office (NTO) website[5].

Image 2.1: Walking in Redcar

The association of Guisborough with the North York Moors National Park also builds significantly on the ability of the borough to be able to present an attractive proposition to walkers, as does the addition of key themed walks (e.g. The Ironstone Heritage Trail, geology trails, and wildlife).

An example of good practice in the borough is how Guisborough has become a 'Walkers are Welcome' status town. The community should be commended for taking forward this initiative. In particular, the group have provided useful information on the trails available from the town (i.e. distance/length and ascents), and have categorised each based upon difficulty.

It is important that the impetus this initiative has

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[3] Economic impact of outdoor and environment related recreation in the Highlands and Islands: research report - walking and mountaineering
[4] Walking Tourism Strategy was prepared for Brecon Beacons National Park in 2005
[5] http://www.nationaltrail.co.uk/cleveland-way

given is driven forward and is reflected in all information provided. This should include information provision online and in printed material. We have reviewed the main website[6] and the printed material promoting Guisborough Walkers are Welcome and based on best practice from elsewhere suggest that the website lack coherence and quality. There are errors on some pages and there is no overall map noted of all the trails available. The one map that does exist simply refers to the trail start points only and not the route that any of the trails referenced use.

To maximise the value of walking, and the 'Walkers are Welcome' status, it is important that the information provided is of an appropriate standard to support all potential users. In the main, this will be those seeking easy to moderate difficulty trails (i.e. 'beginners' to 'wanderers'). These groups generally require attractive and easy to follow guides with useful information on potential stopping places en route, especially if there is a pub/café/restaurant associated with the trail.

'Explorers' are more likely to use OS mapping, however as with the Cleveland Way National Trail, some information identifying places to stop, eat, drink and stay would be welcome.

Other options that should be considered in terms of attracting and enticing the walking market to Redcar and Cleveland include:

- Building an element of 'challenge and reward' – i.e. challenge one's self through completing a trail and then reward one's self through discovery rewards (i.e. local knowledge gathering), Indulgence/pampering rewards (i.e. quality pub grub to high-end food and drink, spa treatments), and mix and matching activities (i.e. walking, cycling, watersports as an 'active' break).

- Maximising vantage points – ensuring that the key vantage points are accessible via a walking (and other activity) trails. This is already being achieved through the Great Ayton Try a Trail (i.e. 7.3-mile circular trail to heights of Roseberry Topping).

- Trail access points – ensuring that the identified trail access points are supported by appropriate amenities such as a walking trails' information board providing the key information on the trail(s) available. Typically, the board should include:

  - a map of the trail(s), using colour-coded graphics if more than one trail is available;

  - a brief description of the trail, its length, and key features of interest;

  - details of local amenities to support such as 'walker welcome' toilet amenities, refreshments, and accommodation;

  - local tourist information sources and sources of additional information (including via mobile technologies – i.e. using QR-Codes);

  - safety information, including contact numbers; and

  - the message of 'Leave No Trace' along with key guiding principles.

The examples above demonstrate that walking tourism can be a valuable market irrespective of whether the focus is generic walking in destination, or whether it is specifically geared towards a key trail.

[6] *https://sites.google.com/site/guisboroughwalkersarewelcome/home*

2.3 Cycling

Market Context

Cycling as an activity is growing in popularity across a broad range of groups, with the recent success of Great Britain in terms of the Olympics, Paralympics and Tour de France likely to be further catalysts for encouraging participation.

The popularity of cycling was recently highlighted by a Sport England survey[7] that revealed that 3.6 million adults take part in recreational cycling every month at levels beneficial for health. Cycling is the fourth most popular recreational activity in England, ahead of football (3.1 million of the population once per month). Furthermore, according to research undertaken by Sustrans in 2009[8], the National Cycle Network (NCN) carried 407 million journeys with over half (208 million) being by bike. A large part of the success of the NCN is that a third of the network is traffic-free.

Approximately 1% of all domestic tourism trips in England are directly driven by cycling, and 7% involve some form of cycling once at the destination[9]. This equates to nearly 801,000 trips taken specifically for cycling, and just over 5.6 million trips where cycling is undertaken whilst at the destination. The value of these trips is estimated at £127.9 million and £895.4 million respectively.

Comparator Areas

Although participation rates in cycling are less than walking, the prospects for increasing participation are considered to be high throughout the UK. For tourism destinations that have attractive countryside and coastal settings to explore, cycling presents a good market opportunity to exploit.

To act as an exemplar, a specific Cycling Tourism Strategy has been produced for Cumbria in order to exploit more of the opportunities for cycling that exist. A key recommendation for the strategy is to establish a small number of highly successful hubs that have the capacity to earn a reputation for excellence in cycling. Specific opportunities associated with these hubs included the following:

- Encouraging cyclist-friendly accommodation, with cyclists requiring somewhere dry and secure to leave their bikes; potentially a hose to wash mud off the bikes; and somewhere to wash/dry wet panniers and clothes.
- Developing trails from the hubs that have the scope to offer well maintained and well signposted routes that use largely off-road tracks such as bridleways, byways and Roads Used as Public Paths. The sort of route development that is identified as presenting the fastest growth opportunity in terms of numbers of cyclists is defined as easy, family, traffic-free routes.
- Establishing events and challenges, including regular competitions and potentially one-off rides over a defined time or length (24-hour; 100 miles).
- Sales and repairs to service requirements for bike spares, replacing parts and purchasing clothing.

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[7] *Active People Survey (APS) results – individual sports, 2011*
[8] *Moving forward - A year of delivering smarter travel choice, Sustrans, 2010*
[9] *UKTS – 2003. Please note, UKTS ceased providing a breakdown of trips by type of activity after 2003*

Lessons Learned

Redcar and Cleveland is supported by a number of cycle routes. These routes are a mix of on-road and traffic free pathways and on-carriageway cycle lanes.

RCBC publishes a detailed map denoting the network of usable cycle pathways and roads suitable for cycling. These maps are useful in the context of allowing an experienced cyclist to identify routes that they can follow safely when exploring the area. However, there is limited information on how a cyclist, particularly a less experienced cyclist, can use this information to create a meaningful trail.

Image 2.2: Cycling in a Forest

Cycling trails of differing lengths and suited to different abilities should be identified and presented to visitor audiences. Some of the most successful trails (e.g. Camel Trail in Cornwall) are relatively short but offer an experience that can support the whole family. Camel Trail supports 300,000 users per annum and four bike hire companies. The combination of being a 'countryside to coast' trail forms a significant part of its appeal.

Redcar and Cleveland has the makings of a similar offer. The NCN Route 168 is 13-miles, covers different terrain types (i.e. moorland and forest), links coast and countryside, and is mainly downhill. However, some of the trail is on-road. It is recommended that the trail be developed and promoted further as a flagship route, with a shorter option of Guisborough to Saltburn also being available. This will require mapping, leaflets/guides and ideally some cycle hire provision. A coastal cycle trail between Saltburn and Redcar should also be considered.

Although the audit identified some cycle retail in the area there is no cycle hire centre within the borough. For cycling to develop as a theme for visitors, this needs addressing. However, the provision of cycle hire will develop momentum as the provision in dedicated trails improves.

Another initiative that could be considered in Redcar and Cleveland includes establishing a dedicated mountain bike trail, possibly using one of the existing Country Parks. An example of this type of amenity is at Dalby Forest. Using a forest setting, the centre includes a series of trails for cyclists of different abilities. The site offers rugged undulating routes, and there are a combination of on-trail obstacles such as berms, log rides and rock drops that enhance the riding experience. Cycle hire is also available. This is also explored in the extreme sports section below, but it would also potentially appeal to other audiences such as youth groups, families with older children, and friendship groups. Such a facility would also support a cycle hire function. At a 1-hour drive time from Saltburn, it is possible that Dalby Forest could also be used by those visiting Redcar and Cleveland. However, it would also be worth exploring a similar centre for the borough, particularly given the proximity to Middlesbrough.

As with walking, in the absence of defined challenges, the focus for cycling should be on developing associated rewards. In this respect, cycling experiences of Redcar and Cleveland would be enhanced through similar initiatives such as discovery, pampering, and badge of honour rewards. Mixing and matching and building in achievement rewards could also be considered, with the latter possibly including time-trial events. Each of these rewards can be attained relatively easily and would enable the cycle trail to be presented with reward elements that go beyond simply the enjoyment of the trail itself.

2.4 Horse Riding

Market Context

Horse riding in the UK is a popular activity and one that an increasing number of destinations are now supporting. As it requires specialised equipment, it has the capacity to be highly lucrative as a niche tourism activity.

The British Equestrian Trade Association's (BETA) National Equestrian Survey 2011 of riding across Britain revealed that the number of horses, including those kept by private owners and in professional establishments, is around 900,000. These horses are owned or cared for by 415,000 people. Other relevant data identified by the survey include:

- Approximately 3.5 million people in Britain rode at least once during 2011. Although this is 19% down since 2006, it is 1.1 million more than in 1999.
- Around 1.6 million people ride at least once a month
- The number of riders is expected to increase as the economy improves and there is greater affordability. An overall growth in riding since 1999 suggests a positive long-term outlook.
- Nearly half (48%) of regular riders are aged 24 and under, but significant growth has appeared amongst those aged 45 and over. This is being linked to ex-riders taking up the sport once more after certain lifestages (i.e. fully grown/left home children)
- The average purchase value of a horse is £2,160, just £10 more than five years ago.
- It is estimated that direct expenditure related to the upkeep and care of horses in the UK stands at £2.8 billion – £3,105 per horse, per annum.
- Other costs involved in owning a horse are estimated at £557 million a year, including £191 million spent on footwear and £129 million on riding hats and body protectors.

The gross output of the equestrian sector is valued at £3.8 billion a year. The costs associated with this interest mean that participation is strongest amongst ABC1 socio-economic groups. It is also one of the few outdoor activities that is largely dominated by female participants.

Comparator Areas

For greater equine tourism to be achieved, the British Horse Industry Confederation suggests that a more cohesive approach to promoting equestrian tourism is needed. For example, a national register of riding holidays and equestrian tourism opportunities should be published on the internet; and a national descriptive grading system for equestrian tourism should be established. Furthermore, the need for access to good quality riding tracks, riding schools and livery stables is identified as being vital to any type of leisure-based participation.

Such strategic requirements are now being translated into specific actions and policies at a regional and sub-regional level. For instance, the Wales Tourist Board has identified riding holidays as a considerable growth opportunity and has attached a target growth of 10% within this market alone. Specific priorities here are to:

- Develop a better maintained network of routes and trails;

- Create product and marketing links between routes and other rider products and services to create a holistic and co-ordinated riding tourism offer;
- To diversify the riding tourism accommodation base to include serviced and self-catering establishments that more closely match the needs of growth markets; and
- To co-ordinate and package the riding tourism holiday experience to maximise potential.

Similarly, Tourism South East has produced a strategy for developing the South East Region's sustainable equestrian tourism. The strategy adopted a more all-encompassing approach to equestrian tourism by including sports, competition and training in horse racing and show jumping. In this context, the strategy highlighted the need for:

- Developing riding events;
- Investigating the feasibility of a major indoor equestrian centre; and
- Creating racing short break packages.

Lessons Learned

Image 2.3: Horse Riding

The equestrian sector already represents an important tourism theme for Redcar and Cleveland as demonstrated by the presence of the Redcar Racecourse. Although the racecourse attracts visitors throughout its annual calendar of events, this is not translating into overnight stays and rather the visits tend to revolve around the event only.

A correlation between hosting horse racing and being able to encourage participation in horse riding is not inevitable. Diverging opinions over horse welfare can often create conflicts between the two areas of equestrianism. Therefore, it is not always advisable to offer or promote horse riding on the back of horse racing events. Rather, horse riding should be considered a leisure pursuit, but one which requires specialist equipment and tuition. Therefore, the provision of riding centres that offer schooling and hacking are essential in being able to present horse riding as a tourism product.

The audit revealed a number of riding centres that are able to support visitors as well as local audiences. One of the primary attractions for some will be the ability to hack out along the beaches of Marske and Saltburn, and up into the countryside which afford views over the surrounding area. However, in terms of their offer, the centres are aimed at day visitors only rather than overnight visits. Other destinations have been able to establish dedicated multi-day horse riding treks including accommodation, whilst some centres are also able to offer accommodation to encourage multi-day schooling and skills development. Such options could be considered for Redcar and Cleveland.

The network of bridleways and byways available to horse riders is also important. The RCBC website includes a map of the key routes available around the borough along with horse box parking. As identified in the audit there are five main clusters. Further examination of the support available to horse riders is recommended within each of these clusters. For example, the provision of horse box parking, although good overall, is not available within some cluster areas. Consideration should also be given to dedicated mapping and stop-off points (with places to tie horses safely) along any trail. Thought could also be given to accommodation that could offer safe stabling for horses for those seeking overnight stays.

There are a growing number of websites dedicated to supporting equine holidays[10]. They provide information on trips ranging from single day and multi-day courses in equestrian centres through to single-day and multi-day treks/hacks in the UK and overseas. Examples of packages that have been developed to attract horse riders to certain destinations (and could be considered by Redcar and Cleveland) include the following:

- Farm Horse Breaks – farmhouse accommodation coupled with horse riding lessons and hacks.
- Horse and Spa – accommodation in a 4-star hotel with spa coupled with lessons and hacking for beginners and advanced horse riders.
- Horses and Chocolate – B&B accommodation with horse lessons/hacks combined with a chocolate experience at a local chocolatier.
- Dressage Break – Farmhouse accommodation with the chance to develop and hone dressage skills to an advance stage.
- Beach Ride – B&B accommodation with combined forest and beach-based hacks.
- Holistic Healing and Horses – specialist spa treatment and horse riding packages.
- Bring your own horse packages – accommodation and stabling for hacking in the countryside or along the coast.
- Unaccompanied children – packages designed specifically for children with full-board accommodation and horse riding lessons with stays from between 2 and 13 nights.

Whilst this list is by no means exhaustive, the examples demonstrate that horse riding is being combined with other interests and pursuits, particularly those more likely to appeal to female audiences.

[10] *These include www.equestrian-escapes.com, www.bridleways.co.uk, www.equineadventures.co.uk, www.equinetourism.co.uk, www.inthesaddle.com, and www.unicorntrails.com*

2.5 Extreme Sports

Market Context

In 2005 over 25% of 16–24 year olds had participated in extreme sports, and according to a study by Mintel, extreme sports are the fastest-growing segment of the leisure market. There are also higher participation rates amongst men.

Extreme sports cover a broad spectrum of interests including skateboarding, bungee jumping, surfing, climbing, diving and sky-diving. The list also continues to grow through innovation. Research has found that there is a high level of crossover between different types of extreme sports[11]. For example, 62% of bikers also skateboard. Although these two activities share certain characteristics (i.e. ramps and circuits) there are also close relationships between mountaineers and white water rafters; skiers, who also enjoy mountaineering, surfing and windsurfing; and surfers who enjoy other watersports and activities such as mountaineering, skateboarding and motocross.

Comparator Areas

The tourism potential of extreme sports lies in the fact that the activity and availability of a strong offer can generate significant numbers of visitors for a destination. The coastlines of Cornwall, Devon and Pembrokeshire, for example, have been transformed with the growth in popularity of surfing, sea-kayaking, kits surfing and coasteering, for example. Similarly, the Peak District offers a range of extreme sports includes bouldering, slab climbing, mountaineering, white water rafting gliding, and hand gliding to name but a few.

Extreme sports have also helped to transform lesser known destinations and areas. For example, **Adrenalin Alley, which is located in Corby, Northamptonshire**, is regarded as one of the biggest, safest and best urban sports park in the UK offering a range of activities such as a large indoor and outdoor ramp park, Resi Jump box, a foam pit and bowl. It also includes other youth activities including photography and media studio and education suite. As a result, since opening in 2006, the centre has hosted over 450,000 visitors.

Similarly, **Transition Extreme in Aberdeen** is a purpose built multi-faceted extreme sports complex that offers skateboarding, climbing, BMXing, inline skating, a creative zone, a pool, mixed martial arts, meeting facilities, learning zone and recreational space. This award winning facility is now regarded as one of the flagship facilities of its kind across the UK. As a result, it is able to attract high-profile events of regional and national appeal including Scottish Miniramp Championships and the War of Thistles, ‘a two day skate festival/jam/episode’.

Training and skills centres often form a critical component for other extreme sports options. Surf schools are now commonplace within destinations that have a strong surfing offer. Similarly, the number of BKSA accredited kitesurfing schools is also increasing. These ‘schools’ or activity centres are commercial operations, and therefore many offer multiple disciplines in order to support as broad an audience base as possible, for example:

- **Fforest Outdoors, Cardigan, Pembrokeshire** – a multi-activity centre that offers a range of activities on-land (e.g. climbing, archery, woodland crafts, bushcraft), on-river (e.g. canoeing, kayaking and whitewater rafting), and on-sea (coasteering, sea-kayaking, surfing). The centre also includes a series of accommodation (Fforrest Camp, Manorafon Camp, Granary Loft Apartments) in the form of log cabins, tent pitches, and self-catering properties.

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[11] *Extreme Sports, Mintel (2005)*

- **Outdoor Adventure Ltd, Bude, Cornwall** – a multi-audience activity centre supporting schools, stag/hen parties, and families. The centre is available as residential and non-residential, with the accommodation providing private room on a full board basis to dorm-style accommodation. Activities available include surfing, coasteering, kayaking/canoeing, climbing/abseiling, archery, and coastal traversing.

- **KA Kitesurfing, Beadham, Northumberland** – a registered BKSA training centre on the northeast coast, KA Kitesurfing specialises in providing kitesurfing lessons but has also broadened its offer to include coasteering and stand up paddle boarding.

Lessons Learned

Image 2.4: Kite Landboarding in Redcar

The consultation process has identified that this theme has further potential for development, however the existing provision lacks co-ordination, packaging, and in some instances, quality in facilities or supporting amenities to encourage more extreme sport enthusiasts to the area, particularly for overnight stays.

Redcar and Cleveland already has some facilities related to delivering certain extreme sports experiences.

Saltburn regularly features as one of the top 5 or 10 places to surf in the UK[12]; Redcar has, in the past, been dubbed one of the is the hottest places to do kitesurfing outside of Hawaii'[13], and has hosted a Kitesurfing Festival; there are a number of BMX schools and rally tracks; and there are two indoor skatepark facilities in the borough. In addition, and after an absence of 39 years, Redcar hosted the British Land Sailing Championships in 2013 and 2014 (the Redcar Regatta) with further events planned. However, despite this, the borough does not currently feature as strongly as other destinations for these types of sporting activities.

Consultation with existing providers and some of the national sports associations suggests that some of key challenges facing Redcar and Cleveland in developing these sports are in terms of the quality of the existing provision and in the nature of supporting services. For example:

- Kitesurfing – the British Kitesurfing Association (BKSA) suggests that a good shop, hire facilities, and a BKSA accredited training centre are currently lacking in the borough. Access to good quality toilets, cafes, and parking is also a requirement to meet the

[12] *http://www.ehow.co.uk/slideshow_12237303_top-surfing-spots-uk.html#pg=3; http://www.sportandrecreation.org.uk/blog/top-10/07-06-2012/top-10-surfing-beaches-uk; http://www.theguardian.com/travel/2007/oct/11/surfing.top10;*
[13] *http://www.bbc.co.uk/insideout/northeast/series2/kitesurfing_landbugging.shtml*

demands of the market. However, the BKSA suggests that Redcar remains a great location for kitesurfing in the right wind conditions.

- Skateboarding – the current facilities supporting skateboarding are not up to the same standards as other facilities elsewhere nationally. A new home for R-Kade Skatepark has long been mooted, however this has yet to happen. A new facility that presents a similar type of offer to Transition Extreme, Aberdeen, Adrenalin Alley, Corby or X-Site Skatepark in Skegness could generate significant numbers of new visitors to the area.

- Surfing – there is some service provision in the form of the Surf Great Britain accredited surf school, surf shop and surf hire, all of whom can offer assistance to surfing visitors. However, the packaging and promotion of the area for surfing is less obvious than other destinations, and therefore the area struggles to attract the same attention compared to Cornwall, Devon and west Wales, for example. The coastline of Redcar and Cleveland can offer good surfing conditions for people of all abilities but other supporting services would be beneficial. In particular, there are issues with existing changing and shower amenities (i.e. unexpected closures), storage and beach access of equipment, and the limited accommodation appropriate to the market such as camping and youth hostels.

- Land yachting – recently re-introduced to Redcar after a long absence, there are suggestions that the sport may have originated from the area. The beach is indicated by the British Federation of Land and Sand Yacht Clubs (BFSLYC) as being excellent for the activity. The BFSLYC is keen to replicate the success of the Redcar Regatta, and are in discussions with RCBC regarding repeating the event in 2015. The BFSLYC has suggested that the beach could also provide a training venue for those seeking to learn land yachting. At present, there is some use of the facility by York Land Sailing Club and Zenith Leisure, however this is ad hoc and requires the transportation of the land sailing craft. A more ideal position would be for a club to be established at Redcar with a view to the facility offering 'try' experiences to individuals and small groups.

Other activities that should be developed further include mountain biking, BMX-ing, climbing coasteering (potentially around Saltburn), and stand-up paddle-boarding to offer the appropriate mix of extreme sports.

A recurring issue to address, that is relevant here in developing Redcar and Cleveland as an 'extreme sports activity hub' is to ensure that the there is a good mix accommodation to suit this market. This will mean options that can accommodation youth groups (i.e. friendship and organised groups), families and educational groups, such as youth hostels and camping.

Adrenaline Alley in Corby is a charitable award winning social enterprise and a Company Ltd by Guarantee. It demonstrates how a staged approach and innovation can help leverage in a wide range of funding and support. Examples of financial and other support included; Rockingham Motor Speedway, Corby Borough Council, Social Enterprise for East Midlands, Bee Bee Developments, Northamptonshire Enterprise Partnership Ltd, WREN, Big Lottery Fund, The High Sheriff's Fund, Northants County Council, and Awards4All[14].

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[14] *See http://www.adrenalinealley.co.uk/our-story*

2.6 Events/Festivals

Redcar and Cleveland already has a series of programme of events and festivals. There are some events that are more inclined to motivate visitors to the borough whilst others will be more likely to form part of the portfolio of things to do and see.

A key function of events should be to drive new business during out of peak season periods. A key observation of the events and festivals associated with Redcar and Cleveland is that the programming of some of the key events is with the summer months, with many being outdoors. However, other events may be needed at other times to help encourage visits to the area out-of-season, and thus to support the visitor economy at these times.

Image 2.5: Redcar Rocks!

In association with some of the other themes being considered in this VDP, there could be scope for some additional events to be considered including:

- Extreme Sports events – it is understood that national events for skateboarding, kitesurfing and surfing have taken place in the borough previously, however a combination of poor weather conditions and lack of commercial success has meant that these events no longer take place. Whilst this position is understandable, for Redcar and Cleveland to be considered as a hub for extreme sports, these types of events need to be supported, at least periodically if not annually. National/international events raise the profile locally, encourage participation and leave a legacy from which the activity can prosper. Commercial sustainability is important, however wider benefits should also be considered in terms of the returns that these types of events can generate. For example, two local young surfers are currently being supported by a local surf business to compete in the UK Pro Surf Tour which has competitions across the UK annually. The business in question believes a Tour event held in Saltburn would unequivocally boost local and visitor participation in surfing, which in turn would benefit their business. This would allow further sponsorship of other local surfing talent in the future.

- Activity-events – local walking events, cycling events and a leisure horse riding event could be useful additions to the events calendar to allow local residents and visitors to understand the opportunity to participate in these activities, raising awareness of the existing businesses supporting these activities.

- Christmas in market towns – although not suited to all of the market towns, one market town could establish itself as the 'Christmas Town' for December hosting a series of events through the town and having a presence of enclosed wooden stalls and perhaps an outdoor ice rink (space permitting).

- Arts and crafts – this was highlighted in the consultation process as an area with huge potential for Redcar and Cleveland. Arts and crafts continue to be very popular and they appeal to the creative side of the area. This could include events hosted around craft, cake making, design, textile, sewing and hobby craft.

This list is by no means exhaustive and there exist many other opportunities. This presents one opportunity to utilise the creative and imaginative side of the borough and to sell the distinctiveness of the area. Nevertheless, events can be expensive and time consuming to organise. It is imperative therefore, that the events generate a significant return and help raise the profile of the area. This will require some type of feasibility assessment (in terms of demand and local concerns, e.g. congestion) before any major events are hosted. Also of the upmost importance is that RCBC and its partners widely publicise events in and outside the borough across a wide range of channels. This is not happening successfully enough at present.

2.7 Heritage

Market Context

The strength of heritage as a tourism theme that can motivate visitors has long been recognised. Nationally, 4.35 million holiday trips in 2013 included a visit to a castle or other historic site and 4.32 million holiday trips included a visit to a museum[15]. Heritage is also identified as a one of four key themes that form the focus of VisitEngland's current 'Growing Tourism Locally' programme supported by the Regional Growth Fund.

Comparator Areas

Many destinations have sought to group heritage assets by sub-theme and intertwine stories around how the assets of the sub-theme have helped to shape the landscape or cultural fabric of the area as it is today.

There are many examples where this type of theming is evident, from the 'Defence of the Realm' of Portsmouth which encapsulates the many attractions and historic features relating to Portsmouth's maritime history; through to the integrated experience of Stratford-on-Avon, the birthplace of William Shakespeare, whereby visitors can visit five houses connected to him and his family. The inclusion of a heritage trail to encourage discovery of a town or even a village is becoming more commonplace.

The key requirements of any heritage trail are often multi-faceted in that they need to inform, educate, entertain, encourage visits to attractions, encourage exploration of an area, and encourage economic exchange. Therefore, a trail must include certain key elements including:

- Identification of all of the key assets within the sub-theme.
- Factually based information on each of the key assets within the sub-theme.
- A 'hand's on' experience that animates the human element of the history that is being imparted.
- Access to more information (e.g. online, associated museums, etc).
- Other places of interest nearby.
- Identified places for engaging with the commercial sector (e.g. accommodation and catering establishments).

There are many examples of trails that can be used to illustrate this potential, with some pertinent examples given the context of Redcar and Cleveland:

- **Robin Hood Trials** – albeit a mythical character, several tours have been developed to introduce visitors to different sites associated with Robin Hood. There is a Nottingham City Trail Guide[16] which retells 12 famous Robin Hood stories at different locations along a linear trail within the city; and there is also a driving trail which can be downloaded[17] which travels between Nottingham, Sherwood Forest, Edwinstowe; Rufford Abbey, and Creswell Crags; all of which are attractions in their own right.

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15 GB Tourist, 2013 - VisitEngland
16 http://www.nottinghamcity.gov.uk/static/therhtrail/Guide.pdf
17 http://www.experiencenottinghamshire.com/robin-hood/robin-hood-trail/mp3-downloads

- **North Calder Heritage Trail**[18] – a 16km linear walking trail that explores Monkland Canal, Monkland Iron and Steel Works, and the influence on the development of ship building industry on the Clyde.
- **The Bexhill Smuggling Trail**[19] – a thematic trail that links six sites that explores the history and influence that the smuggling trade had on the area between 1700 and 1850. The trail now includes six multi-lingual interpretive panels at locations where the action actually took place. The Bexhill Museum also includes objects and documents relating to the area's smuggling heritage.
- **Stonebarrow's Smugglers Trail**[20] – a trail that explores the lives of the smugglers that once lived along the Dorset coastline and the revenue men that tried to catch them. The trail, which is largely orientated towards families with children and schools, includes a map, story posts, activity sheets, and audio commentary which can be downloaded.

Lessons Learned

Image 2.6: Skinningrove

Redcar and Cleveland's heritage product has some notable physical assets, particularly the Zetland Museum, Saltburn's Cliff Lift, Saltburn Pier, and the Kirkleatham House and Museum, and Gisborough Priory. These assets are accessible to visitors, and therefore can stand alone in terms of being presented as part of the amenities to be used to attract visitors to the area. However, to ensure that the visitor value of these assets is being maximised, they should ideally be used to impart information and encourage exploration of the wider heritage of the area.

An example of this is Kirkleatham House and Museum. The museum is home to the Anglo-Saxon artefacts found at Street House, Loftus. The exhibit has proved popular, demonstrating the interest that such finds can have. However, unlike a similar find in Sutton Hoo whose burial grounds can be explored by visitors, the artefacts for the Street House site are unlikely to be supported by its own dedicated onsite visitor experience. Instead, in order to broaden the scope of asset, it may be possible to broaden the understanding of Anglo-Saxon influence by encouraging further exploration of the area. One example would be to set the challenge of discovering the meanings of Anglo-Saxon place names of the borough. At the other end of the spectrum, consideration could be given to establishing an Anglo-Saxon village attraction such as West Stow in Suffolk. This attraction is a 'living history' museum that includes workshops, walks and talks around Anglo-Saxon life.

The history of Ironstone is featured within a dedicated car and walking trail of the area. The car trail links each of the main centres of Redcar, Saltburn and Guisborough; whilst the

18 http://www.northlanarkshire.gov.uk/CHttpHandler.ashx?id=1900&p=0
19 http://www.discoverbexhill.com/trails/smugglers.php
20 http://www.dorsetaonb.org.uk/explore/a-time-and-a-place/61-smugglers-in-dorset

walking trail (a linear trail) connects Skinningrove to Guisborough and Eston via Eston Moor. A similar trail should be considered for smuggling, with this trail likely to lend itself to the coast and at least part of the Cleveland Way National Trail. As with the examples mentioned above, this sub-theme will require animating through the use of different types of interpretation material (e.g. Mapping, in-situ information boards, audio, etc).

An 'Early Life of Captain Cook Trail' could also be considered that encapsulates some of the places that would have inspired the young James Cook into becoming one of history's greatest explorers. This would need to be undertaken in conjunction with neighbouring areas to bring different aspects together. However, if delivered, it would also connect well and extend the Captain Cook focus of the Captain Cook Memorial Museum in Whitby.

Other aspects that should be considered include the following:

- A heritage trail for each of the main centres[21], with Saltburn's historical character and architecture in particular lending itself to this type of initiative.
- Ecclesiastical trail – some of the most important architectural and historic monuments of an area are churches. Moreover, with churches generally requiring support for conservation, visitors are often encouraged through donations, purchases (e.g. interpretation booklets), and (subject to feasibility health and safety considerations) providing access to the churches e.g. towers. Churches can also – in some instances – present performance venues (e.g. the existing choral/music events).
- World War II heritage **-** consideration should be given to any stories of the area's WWII heritage and how this could be presented more holistically as a theme of interest.

[21] It is noted that Guisborough already has a heritage trail, however it may be useful to revisit and revamp the trail

2.8 Coastal Offer

Market Context

The prospects of coastal resorts and towns have been a concern across the UK for some time. The long term trend in domestic tourism was the change from long-stay general holiday-making to a preference toward shorter duration and second holidays being taken in the UK and longer holidays being taken abroad. The subsequent effect this had on coastal resorts, which had hitherto been the main beneficiary of long-stay tourism, was a steady decline in the fortunes of individual tourism businesses and the respective local economies. Moreover, the short-break market witnessed growth in city breaks and countryside escapes which in turn diluted the potential for coastal resorts to benefit from this market.

A programme of regeneration has ensued to restore many coastal resorts back to their former glories, with the aim being that they should once again be presented as attractive places to live, work and visit. Recognising the issues of the past, coastal resorts have and continue to benefit from investment and regeneration programmes that place emphasis on the need to revitalise the visitor sector in a sustainable manner, but as part of a broader urban regeneration plan. This has, at least in part, been encouraged and supported at a national level with one coastal resort regeneration advisory document, for example, stressing the need to drive '…cultural and creative regeneration and economic growth in seaside resorts by funding inspiring, creative and innovative projects, bringing a sense of pride, enjoyment and celebration'. Some examples of this are set out in the comparator area sub-section below.

The family market is critically important to UK destinations of all types, but particularly those that include coastal resorts. Coastal resorts have for generations presented an important component of the 'family holiday'. There is also a nostalgic value to visiting coastal resorts with adults seeking to provide their own children with similar experiences that they had as a child. Therefore, whilst families are seeking modern day amenities and quality experiences, they will also be keen for the main fabric of the area which they remember from holidays past to still be present.

In 2011, there were 7.5 million families (41% of households) in the UK with dependent children, an increase of 190,000 since 2001[22]. In addition, there are more single child households, accounting for 46% of families in 2011, up 3.8 percentage points since 2001. There were also more births in 2009/2010 (797,000) compared with 2001 (663,000), with future forecasts also suggesting that children aged 0-5 will increase significantly as a proportion of the population to 2033. These statistics are pertinent in the fact that families with children of pre-school age are much more flexible about holiday times and will holiday outside of the traditional school holiday periods. Indeed many are inclined to target school term periods because they result in cheaper and quieter holidays.

Key features that appeal to family audiences are appropriate attractions and clearly defined open spaces within which children can play in safety. For coastal destinations, this has traditionally been satisfied through designated pleasure beaches, with the combination of beaches and the sea providing the spaces for informal play such as building sand castles, paddling/swimming in the sea, rock pooling, and so on. Over time, this has increasingly combined with formalised and often fee-charging components such as piers, games arcades, fairground rides, and, in certain areas, theme parks (e.g. Fantasy Island, Skegness).

[22] *ONS Families and households*

Comparator Areas

Coastal resorts that have successfully benefited from regeneration programmes include:

- **Bridlington** – significant investment has been made in the re-development of The Spa, a £20.5 million project to establish a year-round events, business and conference venue. In addition, proposals for developing a marina are coming closer to fruition, with the aspiration being to attract visitor as well as permanent moorings

- **Bournemouth** – ambitions to create a more active beach setting were achieved through the addition of Europe's first artificial reef, a project that cost approximately £3.2 million. The reef has been beset with problems, and has subsequently been re-branded the new Coastal Activity Park. This supports a range of watersports (e.g. surfing, kite surfing, windsurfing and paddle boarding), beach sports (e.g. beach volleyball), and a dance and fitness studio. Effort is also being made to re-invigorate the retail offer by temporally converting a series of empty retail premises to art graphics and set up art pop up shops.

- **Scarborough** – a £2.8million scheme has been undertaken to transform the town's Sandside and Harbour area into 'one of the best seafronts in Europe' and improve facilities and the environment for people both on and off the water. The investment includes enhancing the pedestrian priority, better access to the wharfs, installing contemporary seating, and creating a new lighting scheme to bring a real night time 'buzz' to the waterfront. An additional 60 new permanent berths and additional space for visiting boats in the town's Inner Harbour have also been created. The Spa, Scarborough has also been the subject of a renovation project at a cost of £3.75 million in order to re-establish its importance as an events and conference arena.

Lessons Learned

Redcar and Cleveland has embarked upon a significant regeneration programme that has resulted in investment in a series of flagship projects such as the Redcar Beacon and the Leisure and Community Heart. Whilst this investment has built capacity and raised the appeal of the area to different audiences, a lack of resources has meant that other aspects of the regeneration process have not been given the same type of attention.

Image 2.7: Redcar Coast

In order to maximise the value of the regeneration investment, resources to support and deliver other important aspects of the coastal visitor experience are also required. This includes aspects such as marketing and promotion, public realm enhancement and maintenance, car parking provision, and public conveniences. Consideration also needs to be given to improving visitor information. The consultation process suggests that these aspects of the visitor experience are currently not of a sufficient quality in Redcar and Cleveland's coastal resorts when compared to other areas.

There is a reasonable level of family-orientated attractions and leisure amenities in Redcar and Cleveland, with the Redcar Beacon helping to provide a recognisable anchor/flagship attraction. However, the existing offer does not lend itself to generating significant economic impact (e.g. beach and Beacon are free). There are gaps in the attraction provision (as well as around the supporting infrastructure) that are typical of family resorts and would help increase the dwell time of families and consequently the economic value. Other similar areas have invested in theme parks, animal parks/zoos, farm park type attractions and family heritage attractions (e.g. steam railway).

Delivering some of these magnet type attractions are not likely within the VDP timeframe, however a great deal of these attractions exist within a 1 hour drive of the borough. Therefore, there exists an opportunity to promote a more multi-faceted holiday experience with a family stay within the borough if the supporting infrastructure can be established).

Alongside this, there are other opportunities to develop leisure assets within the family market context that would help increase the economic impact including:

- The extreme sports centre / hub explored earlier.
- In the shorter-term, the Skate Parks do not feature as an attraction/'thing to do' on the website, yet is a facility orientated towards teenage children. As an extreme sports facility, it also has an association with other adrenalin/adventure activities such as surfing, kite surfing, bmx-ing, and karting, all of which are available in the borough.
- The beach areas would benefit from greater animation through a mix of traditional family activities (e.g. Punch and Judy[23], Beach Huts[24], outdoor play areas) plus alternative options such as giant bungee, temporary outdoor skate parks (possibly a floating ramp), Frisbee golf, and small ride-on attractions to appeal to children of all ages.
- There are good examples of estate attractions being able to attract significant numbers of families through the provision of themed discovery trails (e.g. dinosaurs, wildlife, story books, nursery rhymes). This could potentially be explored at the Kirkleatham Estate.

[23] it is noted that a Punch and Judy show is available as part of a children's entertainment act on Redcar High Street and on Saltburn Promenade, however these are for limited dates
[24] RCBC currently offer annual lets for 20 chalets in Saltburn, on the cliff side, with a waiting list of over 200 people

BUSINESS SURVEY RESULTS

3. BUSINESS SURVEY RESULTS

The following illustrates the results from the business survey. Some questions have been excluded where there was a low response rate.

Table 3.1: Business Type of Responses

Business Type	Count	%
Serviced B&B, Inn or Guest House	3	12.5%
Serviced Hotel	2	8.3%
Self-Catering Properties (excluding static caravans/chalets)	2	8.3%
Holiday Park (including static caravans/chalets)	1	4.2%
Touring Camping and Caravan Park	0	0.0%
Visitor attraction / Leisure Resource*	16	66.7%

**this includes: a community theatre, outdoor activities, a pub and restaurant, museums, art gallery, outdoor activity organisers*

Table 3.2: Age of Business

Period of Time Business has been Open	%
Less than 1 year	4.5%
1-2 years	13.6%
3-5 years	9.1%
6-10 years	22.7%
11-15 years	4.5%
16-25 years	18.2%
Over 25 years	27.3%

Table 3.3: Under Current Ownership

Period of Time Business has been under Current Ownership	%
Less than 1 year	9.1%
1-2 years	18.2%
3-5 years	13.6%
6-10 years	31.8%
11-15 years	0.0%
16-25 years	4.5%
Over 25 years	22.7%

Table 3.4: Size of Business (Employees)

Number of Employees	%
1	11.8%
2 to 5	52.9%
6 to 10	0.0%
11 to 49	23.5%
50 to 99	5.9%
100 to 249	0.0%
250+	0.0%
Unsure	5.9%

Table 3.5: Profile of Visitors

Visitor Market	%
Domestic for leisure purposes	75.6
Domestic for business purposes	15.2
Overseas for leisure purposes	13.3
Overseas for business purposes	3.5

Figures do not sum due to rounding/banding used. Figures do vary considerably for each individual business

Table 3.6: Reasons for Visiting Redcar and Cleveland (where 5 is the highest)

Reason for Visit*	Score
The countryside	4.79
Historic coast	4.47
The range of visitor attractions in the area	4.39
Long distance walking trails	4.37
Traditional sun and sea beach holidays	4.32
Short walking loops	4.16
Visiting family and friends	4.05
Unspoilt scenery	3.95
Water sports/adventure activities	3.94
A sense of tradition and culture	3.94
Market towns	3.84
Wildlife and habitats	3.84
Cycling Trails	3.83
Events and festivals	3.76
Good, local food	3.74
Peace and tranquillity of the countryside	3.74
Historic Houses/Estates and other heritage features	3.42
A sense of escapism	3.32
Golf	3.11
Retail/boutique shopping	2.89

** This is the perceived reason from businesses of their customers*

Table 3.7: Greatest Opportunity for Growth

Growth Opportunity	%
Traditional Family Holidays/Breaks	73.7%
Walking Holidays/Breaks	52.6%
Cycling Holidays/Breaks	52.6%
Heritage Discovery Breaks	42.1%
Adventure Activity (watersports, adrenalin, off-road vehicles, etc)	31.6%
Nature Breaks/escapism (based on the scenery)	21.1%
Relaxation/well-being (rest/recuperation)	21.1%
Ecotourism	15.8%
Golfing Holidays/Breaks	15.8%
Romantic Getaways	10.5%

Figures do not add to 100% as businesses were asked to give their 3 main factors

Table 3.8: Likely Capital Expenditure

Likely Capital Expenditure (next 2 to 3 years)	%
Yes	57.9%
No	42.1%

Table 3.9: Attitudes towards Current State of Tourism in Redcar and Cleveland

Attitude	%
Tourism in Redcar and Cleveland is in decline	21.1%
Tourism in Redcar and Cleveland is relatively stable	26.3%
Tourism in Redcar and Cleveland is slowly getting stronger	36.8%
Tourism in Redcar and Cleveland is a rapidly growing sector	15.8%

Reasons given for their attitude towards the state of tourism in Redcar and Cleveland are set out below.

Reasons for Positive Response

- We have worked incredibly hard to change the way people feel about out our town and the surrounding area. We are seeing positive change in the improvements on ground level and the comments from visitors coming to the market.

- I believe that viewpoints towards the Tees Valley are being challenged and changed. Additionally there is an encouraging spirit growing within the Tees Valley which makes the area more appealing.
- Growing recognition of Saltburn as a destination for surfing, seaside and arts tourism. New developments in Redcar especially Community Heart facilities, considerable work on seafront including Palace Hub Art Gallery and refurbishment of the Regent Cinema. Events including sand yachting (as part of the national 'circuit'), triathlon, half-marathon. Cultural events such as Redcar Rocks. High Street markets.
- Visitor numbers are holding up in general.
- The region is a credible alternative to holidays abroad or elsewhere in the country.
- The improvements to the seafront have had a positive impact on our business, however the town centre is in need of improvement hopefully attracting more local business to invest in the empty shops and venues.
- We are seeing more people staying in this country for their holidays, and spending time visiting local events activity's in the north of England.
- Saltburn residents have invested a great deal of time and effort into maintaining the attractions of the town and promoting events.

Reasons for Negative Response

- Much more effort needs to be expended in identifying and advertising the wealth of tourist places throughout the borough so as to maximise the attractability of the borough to outside visitors.
- Redcar and Cleveland council has made a great deal of investment in Redcar town. This has not been matched by investment in other coastal communities and, in particular, the rural hinterland. There are considerable tourism opportunities in this area e.g. off road cycling in Guisborough,
- Redcar and Cleveland is often considered a hidden gem, people often stumble across the area rather than plan a trip here. Once they have been however they return but new visitors are not targeted.
- Although our visitor numbers remain fairly consistent here in Marske our visitors do mention the difficulty/expense of parking and lack of decent shops in Redcar.
- Redcar high st has got poor quality shops, excess charity shops and has poor facias, shop fronts need improving, funding would literally improve the image.
- Need greater use of social media, get in their Facebook timelines every couple of hours, sponsor / boost posts.
- Reduce the hoops businesses needed to jump through and £ to pay for the brown signs. Too expensive and felt like we had to ask permission to the mayor..... so we haven't bothered.
- No matter what we say to the RCBC in terms of what is needed, they say they don't have the resources.

- The loss of the tourist information office. A well informed public with leaflets, fact sheets and maps will help promote all aspects of tourism.

Table 3.10: Other Attitudes towards Tourism (where 5 is strongly agree and 1 is strongly disagree)

Attitude	Average score
Tourists need to be encouraged to visit outside of the peak holiday periods	4.26
Redcar and Cleveland has the capacity to encourage new types of visitor markets	4.17
There is little awareness of Redcar and Cleveland as a tourism destination	4.00
Redcar and Cleveland needs a signature event	3.95
Tourism in the future will be increasingly reliant upon the quality of the natural environment/environmental offer	3.53
Redcar and Cleveland needs more activities for people to do	3.42
Redcar and Cleveland needs a big new tourist attraction, like the Baltic or Eden Project	3.37
There are not enough serviced bedspaces in Redcar and Cleveland	3.32
Redcar and Cleveland needs higher spending visitors, not more visitors	3.16
The success of tourism in Redcar and Cleveland is only based on the weather	2.79
Tourism in Redcar and Cleveland is now a year round activity	2.53

Table 3.11: Attitudes towards Future Prospects

Attitude	%
I intend to leave the tourism sector imminently	5.3%
I am worried about my future prospects	36.8%
I am happy with my current level of business	10.5%
I want to expand my current level of business	47.4%

Table 3.12: Tourism Facilities that are lacking in Redcar and Cleveland

Tourism Facilities that are lacking	%
Interpretation / signage of key sites of interest	61.1%
More activities/attractions for families	50.0%
Better quality attractions	44.4%
All weather attractions	38.9%
Evening entertainment	38.9%
Specialist shops, arts and crafts	27.8%
Better public transport services	27.8%
Food and drink sourced from local farmers/producers	22.2%
Adventure activities (canoeing, boating, adrenalin sports)	16.7%
Cycling trails	11.1%
None - generally happy with facilities available	11.1%
Long distance walking trails	5.6%
Spa facilities	5.6%

Figures do not add to 100% as businesses were asked to select all factors that apply

Table 3.13: Factors that would help Local Businesses

Factors that would have a Positive Influence on Local Businesses	%
Better marketing of Redcar and Cleveland specifically	84.2%
Increased focus on short breaks/targeted breaks	31.6%
Growth in activities markets focused on activities such as walking and cycling	31.6%
Better marketing of the North East	31.6%
Improved transportation networks	26.3%
Better marketing of the Tees Valley	26.3%
Better marketing of North Yorkshire	26.3%
Better training and education for staff in the tourism sector	26.3%
Improved weather/climate changes	15.8%
Growth in special interest markets focused on wilderness and wildlife	15.8%

Figures do not add to 100% as businesses were asked to give their 3 main factors

Table 3.14: Main Constraining Factors on the Success of Local Businesses

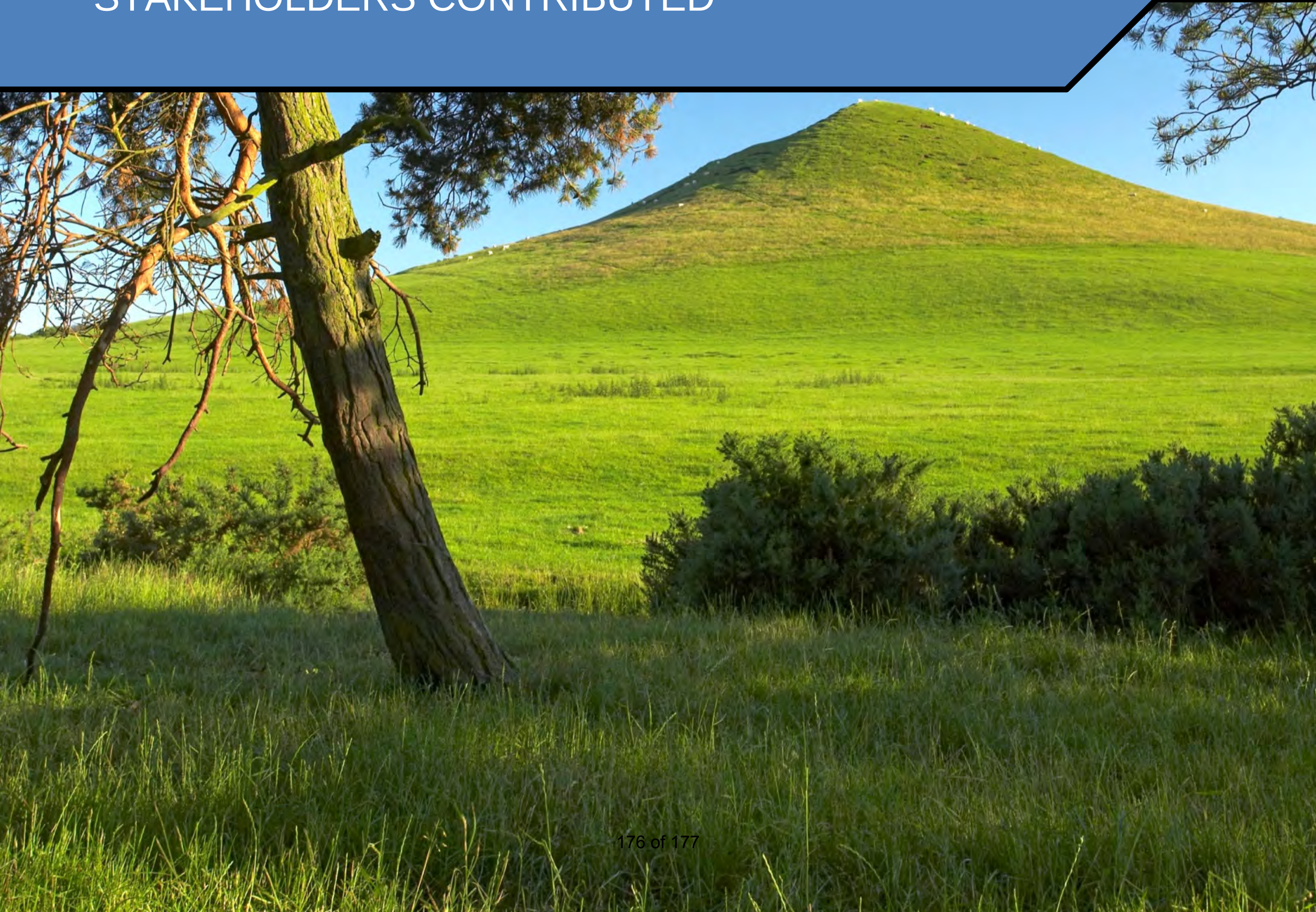
Main Constraining Factors on the Success of Local Businesses	%
Rising costs/falling margins	52.9%
High level of seasonality	35.3%
Economic factors/consumer spending slowdown	35.3%
Competition from other parts of the UK	29.4%
Planning constraints which prevents new investment	23.5%
Poor local transport network	17.6%
Local staff shortages	17.6%
General decline in long holidays/visitors stay fewer nights	11.8%
Competition from overseas destinations	11.8%

Figures do not add to 100% as businesses were asked to give their 3 main factors

Table 3.15: Greatest Marketing Potential

Areas that Present Greatest Marketing Potential	%
Key Towns (Redcar, Saltburn, Guisborough)	21.1%
North Yorkshire Moors	21.1%
East Yorkshire Coast	15.8%
North Yorkshire	15.8%
Tees Valley	5.3%
North East	5.3%

STAKEHOLDERS CONTRIBUTED



4. STAKEHOLDERS CONTRIBUTED

The following lists those organisations who have contributed to the VDP in terms of; being interviewed, completing a business survey, or attending a workshop. In many instances more than one stakeholder has contributed from the organisations but names have been left off to protect confidentiality.

Organisation	Organisation
British Federation of Land and Sand Yacht Clubs	Saltburn Community Theatre
British Kitesurfing Association	Saltburn Folk Festival
Chocolini's	Saltburn Golf Club
Cleveland Ironstone Mining Museum	Saltburn Riding School
Coatham Caravan Park	Saltburn Surf school
e-strands	Seaview Restaurant
Gisborough Hall	Skelton and Brotton Parish Council
Golden Hill Farm	Skinningrove History Group
Grewgrass Lodge	Strathmore Guest House
Hunley Hotel & Golf Club	Tees Valley Tourism Alliance
Loftus Accord	Tees Valley Unlimited
Loftus Town Council	The Outlook and Treetops
Middlesborough Council	The Play Factory
North Yorkshire Moors	The Ship Inn
Ormesby Hall	Torus Digital Marketing
Palace Arts CIC (Palace Hub Gallery)	Totally Locally Guisborough
Palace Hub Gallery	Tudor Lodge Guest House
Redcar and Cleveland Council	Valley Adventures Ltd
Redcar Beach Caravan Park	Visit England
Redcar Racecourse	Welcome to Yorkshire
Ruby and Blue	Winkies Castle Folk Museum