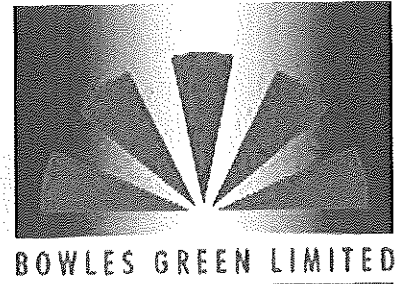


Part I

**BOWLES GREEN LTD**



# Tourism and Economic Impact Assessment for the Proposed Ryedale Gas Project

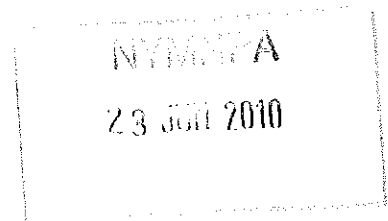
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**Consultants' Final Report**

**June 2010**

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20th June 2010

## **1 INTRODUCTION**

### **The Consultants**

- 1.1 In April 2010, Bowles Green Limited, a specialist tourism consultancy, was commissioned by Moorland Energy Ltd to undertake a tourism impact assessment and an economic impact assessment of the proposed Ryedale Gas Project at Ebberston and Thornton-le-Dale in North Yorkshire. Bowles Green Limited is a respected consultancy; its consultants have many years' experience of advising the public, voluntary and private sectors on tourism development, management and impacts in the UK and overseas.
- 1.2 The company has undertaken a number of tourism and economic impact studies and, in the local area, is advising the RSPB on development of its seabird reserve at Bempton Cliffs. A list of our experience is shown in the appendix and our website address is [www.bowlesgreen.co.uk](http://www.bowlesgreen.co.uk).

### **Methodology**

- 1.3 The methodology adopted for undertaking the assessments is described in the following paragraphs.

#### **Tourism Impact Assessment**

- 1.4 The following tasks were undertaken to inform the likely impact of the development on tourism:
- Reviewing tourism policies and identifying any possible negative impacts
  - Obtaining tourism data to establish a baseline for tourism in the area
  - Consulting with key organisations involved in the management of tourism in the area
  - Consulting with a sample of tourism businesses in the area
  - Researching the impacts of similar developments elsewhere
  - Considering the evidence and estimating the likely impacts

#### **Economic Impact Assessment**

- 1.5 The following tasks were undertaken to estimate the economic impacts of the development:
- Consulting with Moorland Energy to understand employment during construction and operation of the facility, and to understand purchasing needs
  - Estimating the likely economic impacts

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## 2 TOURISM IMPACT ASSESSMENT

### Tourism Policies

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2.1 The relevant tourism policies are as follows; the relevant policies are summarised below:

- Yorkshire and Humber Regional Economic Strategy 2006-2015
- Yorkshire Visitor Economy Strategy 2008-2013
- Bold Vision Bright Future: A Tourism Marketing Strategy for Yorkshire 2006-2010
- Yorkshire Moors and Coast Tourism Strategy 2009-2012

2.2 In addition, the Core Strategy and Development Policies for the North York Moors National Park (part of the Local Development Framework for the National Park Area) have policies, which relate to tourism.

2.3 There are also saved policies in the Ryedale Local Plan, which apply until the Local Development Framework is adopted. Saved policies TM1 to TM6 relate to tourism; all of these relate to the development of various tourism facilities – accommodation, attractions, etc. These do not relate to the Ryedale Gas Project.

#### *Yorkshire and Humber Regional Economic Strategy 2006-2015*

2.4 The Regional Economic Strategy (RES) does not have specific tourism policies. However, it sets the overall direction for tourism. The RES recognises the importance of the tourism sector to the regional economy and image. The overall 'renaissance approach' to developing the regional economy is reflected in the following summary of priorities for tourism in the region:

'A significant priority for the sector will be to grow visitor income rather than just visitor numbers. We will encourage more people to come, to come for longer, to come more frequently. Integrated marketing activity will deliver this message to the domestic market, the business market and the international market. We need to further develop what our unique tourist offer is, what will set us apart from other UK locations, and how it can be sustainable in every sense of the word. In doing this, quality will be our watchword – quality of product, of place, of experience, of welcome – and we will work with all partners who share our commitment to quality. A combination of strategy, delivery and quality will ensure the region meets growth targets set out in the Strategic Framework<sup>1</sup>.

#### *Yorkshire Visitor Economy Strategy 2008-2013*

2.5 The Visitor Economy Strategy is informed by the Visitor Economy Framework. Quality is a key theme in this document; this includes the quality of the product, in turn including the landscape.

2.6 The headline target for the Visitor Economy Strategy is to grow the value of tourism in the region by 5% per annum. To achieve this, the strategy has a number of themes and strategic objectives, as summarised in Table 1.

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<sup>1</sup> Yorkshire and Humber Regional Economic Strategy 2006-2015, Yorkshire Forward

Table 1: Yorkshire Visitor Economy Strategy Summary

Theme	Strategic Objectives
Strategy	<ul style="list-style-type: none"> <li>▪ To provide strategic direction for growth of the visitor economy behind which the tourism sector can align and supporting this a co-ordinated approach to planning delivery</li> <li>▪ To improve regional understanding of the visitor economy and its future trends and develop a better evidence base</li> </ul>
Innovation	<ul style="list-style-type: none"> <li>▪ To develop the region's distinctive tourism offer of the future based on identified strengths and opportunities</li> </ul>
Marketing	<ul style="list-style-type: none"> <li>▪ To ensure that the development of great places in our region maximises the potential for growth of the visitor economy</li> <li>▪ To raise the quality of the tourism offer in the region</li> <li>▪ To bring skills and tourism partners together to instil an ambitious, enterprising leaning culture in the tourism sector where customer service is a top priority</li> <li>▪ To promote a positive image of the region in a contemporary way that inspires visitors to experience Yorkshire</li> </ul>

*Bold Vision Bright Future: A Tourism Marketing Strategy for Yorkshire 2006-2010*

2.7 The objectives of the current marketing strategy are as follows:

1. Attract a greater proportion of business tourism and international visitors, while seeking to grow the return from the core domestic market by focusing on high value visitors.
2. Develop a world-class experience for visitors which will consistently exceed all expectations.
3. Position the Yorkshire brand as a destination of choice for priority target markets with respect to key competitors and achieve measurable increases in awareness of key sub-regional destination brands.
4. Implement a customer focused communications programme to convert awareness and understanding to visits.

2.8 Marketing is delivered around a number of themes; one of these is 'rural breaks', which has two sub themes, as follows:

- Rugged and wild – rugged, wild, breathtaking, unspoilt, invigorating and natural
- Gentle country – relaxing, peaceful, natural, breathtaking, unspoilt

*Yorkshire Moors and Coast Tourism Strategy 2009-2012*

2.9 The strategy of the Yorkshire Moors and Coast Tourism Partnership is currently in draft form. Consultation has recently closed and an adopted strategy is expected shortly. The vision for this strategy is:

- A culture of continuous improvement in the quality of the tourism product that aims to achieve the highest levels of visitor satisfaction in the region
- A product that has broad and inclusive market appeal resulting in a more vibrant, economically sustainable and dynamic tourism sector
- A genuinely sustainable tourism industry that meets the needs of the present generation without compromising the ability of future generations to meet their needs

- A visitor economy that supports high quality jobs, encourages inward investment and nurtures a diverse and exciting cultural life for everyone visiting or living in the Yorkshire Moors and Coast

2.10 The aims are:

- Increase the value of the visitor economy in the Yorkshire Moors and Coast by at least 5% per annum - equivalent to roughly £100m over three years
- Improve the quality of employment in the Yorkshire Moors and Coast by increasing the number of full time and year round employment opportunities
- Increase the proportion of first time visitors to the Yorkshire Moors and Coast from 21% to 35% by 2014
- Increase the average spend per head of staying and day visitors by more than 5%

North York Moors National Park Core Strategy and Development Policies

2.11 The strategy notes that 'the environment of the North York Moors and its scenic beauty and wealth of cultural assets and biodiversity are the principal features that have led to the designation of the area as a National Park'.

2.12 The strategy identifies five 'challenges'; one of these is supporting the rural economy. Here it recognises that tourism is the largest employer in the National Park and that the tourism businesses present depend to a degree on the quality of the natural environment, which attracts visitors. As a result, one of the 'spatial objectives' of the strategy is to 'support the tourism and recreation industry by ensuring that development contributes to the local economy and provides opportunities for enjoying the Park's special qualities'. A number of policies arise from this, that are relevant to the Ryedale Gas Project, as follows:

- A1: Providing a scale of development and level of activity that will not have an unacceptable impact on the wider landscape or the quiet enjoyment, peace and tranquility of the Park, nor detract from the quality of life of local residents or the experience of visitors
- H4: Sustainable tourism based on recreation activities and tourism development related to the understanding and enjoyment of the Park
- Development Policy 14 Tourism and Recreation: The quality of the tourism and recreation product in the National Park will be maintained and improved through adopting the principles of sustainable tourism. New tourism development and the expansion or diversification of existing tourism businesses will be supported where...
- Development Policy 15 Loss of Existing Tourism and Recreation Facilities: Proposals that would result in the loss of an existing tourist or recreation facility will only be permitted where it can be demonstrated, to the satisfaction of the National Park Authority, that the business is no longer viable

2.13 Thornton-le-Dale is categorised as a 'local service centre', the aims of which include 'to provide new job opportunities and assist in promoting long term economic and social sustainability'.

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Summary

- 2.14 The policy framework is supportive of tourism in North Yorkshire. Whilst it recognises the importance of the natural environment as a tourism resource (and policies are in place to protect this), tourism strategy in the sub-region is as much about creating high quality, modern and vibrant tourism products and places which will appeal to existing and target markets. Natural beauty is a key aspect of the regional and sub-regional tourism offer.
- 2.15 It is recommended that the client reviews the final version of the Yorkshire Moors and Coast Tourism Strategy when it is adopted and considers the likely impacts of the proposed development on any changes, aims, objectives, etc. Progress on this strategy can be viewed at <http://www.yorkshiremoorsandcoast.com/trade/about-us-strategy.aspx>.

**A Baseline for Tourism**

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Volume and Value

- 2.16 The volume and value of tourism in the Ryedale area is measured by Welcome to Yorkshire. The latest information available is for 2008 (2009 data is not currently available). It is difficult to identify recent trends as the methodology by which tourism volumes and values are calculated have changed in recent years, which means that the data is no longer comparable. This is a national issue and not one restricted to the Ryedale area or Yorkshire region.
- 2.17 There are approximately 16 million tourist trips to Ryedale District each year. The majority of these are day trips; these include day trips from home, mostly by people living in the Yorkshire and the Humber region as well as people staying in holiday accommodation outside of Ryedale District. Information for neighbouring districts is also shown for comparison.
- 2.18 Tourism is clearly important to the local economy, with over £387 million spent annually in the Ryedale economy.

Table 2: Visitor Trips in 2008 (000s)

Sub-region	Leisure Day	Leisure Staying	Business Day	Business Staying	Total Trips
Ryedale	14,969	987	18	3	15,977
East Riding	13,132	566	209	58	13,965
Scarborough	6,476	1,068	22	26	7,592

(Source: Welcome to Yorkshire)

Table 3: Visitor Days in 2008 (000s)

Sub-region	Leisure Day	Leisure Staying	Business Day	Business Staying	Total Days
Ryedale	14,969	4,624	33	7	19,633
East Riding	13,132	2,428	281	85	15,926
Scarborough	6,476	5,207	35	44	11,762

(Source: Welcome to Yorkshire)

Table 4: Spending by Visitors in 2008 (£m)

Sub-region	Leisure Day	Leisure Staying	Business Day	Business Staying	Total Spending
Ryedale	£216	£169	£1	£1	£387
East Riding	£221	£100	£11	£12	£344
Scarborough	£95	£189	£2	£3	£289

(Source: Welcome to Yorkshire)

- 2.19 Tourists visit formal and informal attractions. The English Visitor Attractions Survey collects information on admissions from formal visitor attractions. Those located in Ryedale are shown in the table below. Unfortunately, three of the district's largest attractions do not return visitor numbers to the survey – Castle Howard, Flamingoland and the North York Moors Railway. According to Welcome to Yorkshire, annual visits to Flamingoland are in the region of 1,300,000 and annual visits to Castle Howard are in the region of 203,000<sup>2</sup>.

Table 5: Visits to Attractions in Ryedale

Attraction	2004	2005	2006	2007	2008
Helmsley Walled Garden	40,000	25,000	20,000	20,000	19,000
Rievaulx Terrace & Temples	27,972	28,229	29,440	28,796	27,646
Byland Abbey	6,696	5,550	6,538	5,515	5,988
Duncombe Park	17,494	n/a	n/s	18,378	17,586
Helmsley Castle	30,596	31,107	32,693	30,464	25,738
Hovingham Hall	1,800	1,633	DK	1,314	1,430
Kirkham Priory	7,580	6,988	5,945	1,440	4,558
Nunnington Hall	51,547	48,757	51,332	59,044	55,201
Pickering Castle	27,226	22,900	24,171	23,017	20,227
Rievaulx Abbey	49,570	41,992	44,082	47,465	41,978
Sutton Park	n/a	n/a	n/a	6,061	5,367
Beck Isle Museum of Rural Life	n/a	n/a	10,158	8,693	8,751
The Moors Centre	123,118	n/a	n/a	76,994	129,991
Kew at Castle Howard	n/a	11,530	13,257	15,990	15,990

English Visitor Attractions Survey 2008, Visit Britain, 2009

- 2.20 Thornton-le-Dale is one of the most popular 'informal attractions' in Ryedale. There is no count of the number of visitors to the village, but an estimate can be made using data on the number of cars at the village car park, where most visitors park because of the limited amount of on street parking available. In 2009, 24,469 car parking tickets and 424 coach parking tickets were sold. Assuming on average there are 2.25 passengers per car and 35 passengers average per coach, in the region of 76,013 people used the car park. Assuming the same proportion of cars park elsewhere in the village (which the consultants believe to be a high estimate given the nature of the village), it can be estimated that in the region of 137,000 leisure visits are made to the village each year (NB: this does not include visits to the village by local people, who are unlikely to pay for parking in the car park).

<sup>2</sup> Visitor Attraction Trends in Yorkshire, 2007, Yorkshire Tourist Board, 2008



- 2.21 Research into the local tourism industry (as the framework for interviewing stakeholders) shows that there is a large number of tourism businesses in the area surrounding the development proposal. These are listed in the Appendix.

Summary

- 2.23 Tourism is an important part of the economy in Ryedale; 16 million visitors spend in the region of £387 million each year. The largest visitor attraction in Ryedale attracts 1,300,000 visits per year and there are approximately 126,000 annual visits to Thornton-le-Dale.

**Opinions of Key Organisations**

- 2.24 A number of organisations are involved in some way in the management of tourism in the Ryedale area, as follows:

- Welcome to Yorkshire
- Yorkshire Moors and Coast Tourism Partnership
- Ryedale District Council
- Tourism Association North Yorkshire

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Summary

- 2.25 Welcome to Yorkshire has a strategic role in tourism management and marketing and was not in a position to comment on the likely impacts of this development.
- 2.26 The Yorkshire Moors and Coast Tourism Partnership and Ryedale District Tourism department made a joint response to the development and question about likely impacts. The joint response concerned the likely visual intrusion into the landscape and was voiced by the Tourism Partnership's Brand and Research Manager, as follows: *'I'm not convinced that the proposed development will be sufficiently well screened from public view to ensure that it has little effect on the visual amenity of the open countryside in which the development is proposed. Visitors to the area value the unspoilt nature of the local environment and their overall experience is currently one of a very high quality. 2.2 hectares is a large area and the proposed structures will be of a significant scale, they are unsightly and I don't feel can easily be blended into the landscape by painting and screening. I would like to see more detail of the proposed screening and camouflage measures in order to make a better judgment of the visual impact which could have a significantly negative impact on the overall quality of the visitor experience'*.
- 2.27 It is the consultants' view that most tourist activity in Thornton-le-Dale takes place in the centre of the village. Very few, if any, tourists visiting Thornton-le-Dale are likely to find their way to Hurrell Lane and therefore they are unlikely to come into close proximity with the proposed plant. In addition, visiting walkers and cyclists are unlikely to use Hurrell Lane in any significant numbers as there are no promoted routes here and the routes lead to the relatively uninteresting terrain of the Vale of Pickering rather than to the hills of the National park, which are more attractive for both activities.
- 2.28 The development at Givendale Head is more likely to have an impact on these types of visitors as it is close to a road which leads to one of the visitor car parks in Dalby Forest. However, the existing plant does not appear to be deterring visitors to this car park.

2.29 The Tourism Association North Yorkshire responded that it did not envisage any significant negative impacts on tourism in the area and that for a short time, workers staying in the area during the construction phase could provide welcome off-season business to accommodation providers, pubs and shops.

**Opinions of Tourism Businesses**

2.30 In the event that there are positive or negative impacts on tourism in the area, the effects of these will be felt first by tourism businesses. In order to gauge the opinions of these businesses, telephone consultations were held. It was decided to consult with businesses located close to the proposed development and therefore our consultation involved tourism businesses in Ebberston, Allerston, Wilton and Thornton-le-Dale (the four villages). The consultation included a combination of face to face and telephone interviews.

2.31 Businesses consulted included accommodation providers, catering establishments, workshops which offer activities for visitors and retail outlets that provide goods for visitors. Table 3 shows a summary of the type and location of businesses consulted; a list of those consulted is included in the Appendix.

2.32 A small number of businesses located beyond the four villages were also consulted, in order to understand geographical extent of tourism impacts. In addition, there are several retirement homes in the four villages; whilst these are not tourism businesses, they attract visitors by people who come to visit their friends and relatives who are residents in the homes. For this reason, we also consulted these businesses.

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Table 6: Distribution of Tourism Businesses Consulted

Allocation/Type of Business	Accommodation	Food/Drink	Other
Ebberston	1		1
Allerston	1		
Wilton	3		
Thornton-le-Dale	7	4	4
Elsewhere in the vicinity	2	1	

2.33 Two residential homes in Thornton-le-Dale were also consulted. Whilst not tourism businesses, the presence of residential homes attracts visitors to an area to visit their friends and relatives who are residents; some will also use local facilities – cafes, pubs, shops, etc. during their visit. No response was received from either business during the time available for the study.

2.34 There was diversity of opinion about the likely impacts of the proposed development on tourism. These can be summarised as follows:

- The general opinion was that there would probably be negative impacts of the landscape during the construction phase, when visitors would be able to see machinery along the pipeline route and there would be an increase in traffic and possible disruption to the A170
- Businesses in Ebberston and Allerston were less concerned about negative impacts than businesses in Thornton-le-Dale and Wilton

- Businesses in Pickering did not believe that there would be negative impacts on tourism, only positive ones from expenditure by contractors and workers; one business located some way to the south of the development was concerned about possible smells on days with a north wind
- The opinions of businesses in Thornton-le-Dale were split between those that felt the development would have a negative impact on tourism and those that felt there would be no impacts beyond minor disruption during the development phase
- Those located closer to the development sites were the most concerned
- One consultee pointed out that the projected number of vehicle movements during operation is lower than those which occurred to and from the seed mill and the quarry/landfill site, neither of which appeared to have a negative impact on visitor to Thornton-le-Dale. Both of these sites are no longer operating
- The chief concerns of businesses that felt that there would be negative impacts were as follows:
  - The development would result in bad smells in the area that would deter visitors
  - The development would be visible, that this would change the natural character of the landscape and that this, especially in the longer term, would deter visitors
  - Negative publicity during the application phase would deter visitors
  - The cleaning process and removal of sulphur from the site would cause significant unpleasant smells and that this would deter visitors
- The benefits identified by businesses included:
  - Short term benefit of additional spending by contractors on accommodation, food, drink and incidental spending
  - Longer term spending by workers and their families who move into the area during the operational phase

2.35 The businesses that felt that there would be negative impacts on tourism did not understand two points, as follows:

- Why processing could not take place at the well site at Givendale Head
- Why processing could not be done at an existing processing plant in the area, for example at Knapton

2.36 One of the businesses interviewed (located on the main road at the eastern end of Thornton-le-Dale) has self catering units that look across the proposed development site. This business is concerned that the attractive view from these properties would be spoilt, that there would be increased traffic noise from the new access road, and that these factors would reduce the quality of visitors' experience thus causing a loss of business in the future. Several businesses pointed out that guests traveling to self catering units located at the Hurrell Lane farms would have to pass the processing plant en route and that this would detract from the current, rural quality of their experience.

2.37 The possible negative tourism impacts of any bad smells issuing from the proposed plant could be significantly mitigated by the scheduling of maintenance work (when emissions of odours are most likely to occur) outside of the visitor season (i.e. during the winter months).

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*Summary*

2.38 In summary:

- The majority of consultees felt that there would be some disruption during the construction phase but understood that this would be mostly outside of the main tourism season
- The majority of the consultees felt that the impacts on tourism were likely to be small if at all
- Most of the businesses that felt there would be negative impacts were located in Thornton-le-Dale or Wilton
- The chief concerns were that:
  - The presence of the processing plant would change the perception of Thornton-le-Dale as a beauty spot
  - Smells from the processing plant would deter visitors
- For a small number of businesses, the gas processing plant at Hurrell Lane would be visible from the business premises

**Impacts of Similar Developments Elsewhere**

2.39 There are already several gas drilling wellheads, pipelines and associated infrastructure in Ryedale. Some of these have been operating for some years and there is no evidence (from comments or complaints received or from significant changes in visitor numbers) that these have had or are having a negative impact on tourism in the District.

2.40 The largest attraction in Ryedale District – Flamingoland – is located close to the Knapton Gas Facility. Until recently the Knapton operation has screening issues and was emitting H2S odours. During this time, Flamingoland attracted in the region of 200,000 visitors per year and the gas facility does not appear to have had a negative impact on visitor numbers.

2.41 There are no directly comparable sites in the UK. However, an indication of the impacts of gas production and processing infrastructure is available from a study of the tourism impacts of underground gas storage facilities. The impacts of several of these projects, which have taken place in tourism destinations is considered here. All of these projects involved the construction of a significant above the ground processing plant and a pipeline to connect to the National Distribution System.

Table 7: Existing Underground Gas Storage Developments in the UK

Location	Operator	Age
Atwick, Near Hornsea, East Yorkshire	Scottish & Southern Energy	20+ years
Hatfield Moors, North Lincs/South Yorkshire	Scottish Power	15 years
The Rough, North Sea, Terminal at Easington, East Yorkshire	Centrica	10+ years
Cheshire, various	Stublek, Canatxx & Gaz de France	Various
Humbly Grove, Alton, Hampshire	Star Energy	1-2 years

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- 2.42 Local authorities and tourist boards collect information on the volume and value of tourism for monitoring purposes. Most use one of two economic models specifically designed for the purpose – the Cambridge Economic Model or STEAM<sup>3</sup>. Information from these models becomes available 18 months or so after the end of each year.
- 2.43 Because of the timing of the above projects, as well as the fact that management of tourism by the public sector has been re-organised recently, it has not been possible to obtain tourism volume and value data which might identify any impacts from the development of gas storage facilities. Therefore, in order to gain an understanding of any impacts, the consultants consulted with tourism officers working for local authorities or 'Destination Management Organisations'<sup>4</sup> to obtain their professional opinions.
- 2.44 The consultees and the areas they represent are summarised in Table 5.

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Table 8: Summary of Tourism Destination Consultees

Location	Operator	Officer	Position
Atwick, Near Hornsea, East Yorkshire	Visit Hull and East Yorkshire	Andy Gray	Assistant Director
Hatfield Moors, North Lincs/South Yorkshire	Doncaster Metropolitan Borough Council	Katie Lewin	Tourist Information Centre Manager
	North Lincolnshire District Council	Christine Edwards	Tourism Officer
The Rough, North Sea, Terminal at Easington	Visit Hull and East Yorkshire	Andy Gray	Assistant Director
Cheshire, various	Visit Cheshire	Emma Clark	Head of Business Development
Humbly Grove, Alton, Hampshire	East Hampshire District Council	Debbie Vodden	Tourism Officer
	Hampshire County Council	Andrew Bateman	Tourism Officer

- 2.45 The consultation findings are summarised here:
- The majority of officers consulted were unaware that gas storage facilities existed within the destinations they manage – despite the fact that relatively large above ground facilities had been constructed and were operating
  - Most felt that there could be some disruption to local tourism traffic during construction of well head facilities and associated pipelines
  - None was aware of any adverse correspondence or comments from consumers or from local tourism businesses

<sup>3</sup> STEAM – The Scarborough Tourism Economic Activity Model, Global Tourism Solutions (UK) Ltd

<sup>4</sup> Destination Management Organisations (DMOs) operate at a sub-regional level where they are responsible for tourism development and marketing, working to a regional tourism strategy and structure

- All stated that they did not believe that the existence and operation of gas storage facilities was having a negative impact on tourism volume or value at the destination

2.46 Based on the opinions of tourism officers for the above areas, there is no evidence to suggest that the development or existence of gas processing facilities has a negative impact on tourism.

### Conclusions

2.47 Here we consider the findings of the above research in order to draw conclusions about the likely impacts of the proposed Ryedale Gas Project on tourism.

2.48 On consideration of the information collected to support this study, it is clear that tourism is an important source of employment and wealth in the area of the proposed development and that the attractiveness of the area to tourists depends, to a significant degree, on the natural beauty of the area.

2.49 Some local businesses are concerned that the proposed development will cause an unacceptable visual intrusion into the landscape and reduce the attractiveness of the area to tourists with the result that spending by tourists in the area will decline.

2.50 It is the professional opinion of the consultants that, with the exception of a small number of businesses located on Hurrell Lane and at the eastern extremity of Thornton-le-Dale, the proposed development is unlikely to have an impact on tourism if the mitigation measures for visual and other impacts, which are described in the Environmental Statement and Specialist Reports, are delivered as proposed.

2.51 Our rationale for this conclusion is based on the following:

- Existing, similar gas drilling and processing operations in Ryedale do not appear to have had a negative impact on tourism in the District
- There is no evidence from elsewhere that such operations cause negative impacts to the tourism industry
- The majority of visitors to Thornton-le-Dale arrive from the west or the south. They park in the main car park of the village centre and therefore they are unlikely to see the Hurrell Lane site, or even be aware of it
- Visitors arriving from the east might notice the Hurrell Lane site on entering Thornton-le-Dale. Their view of it will be fleeting, and likely to have less impact than the malt factory at West Knapton, intrusive farm buildings at Charity Farm and Flamingoland at Kirby Misperton, all of which are also visible from this location
- Despite much local debate and concern, a majority of those consulted felt that the lasting impacts of the development would be minor

2.52 There are likely to be some negative impacts on accommodation businesses located at farms on Hurrell Lane and on the A170 at the eastern extremity of Thornton-le-Dale. Visitors to the former would have to drive past the Hurrell Lane site to reach their accommodation and the presence of the facility would, undoubtedly, change the character of this approach.

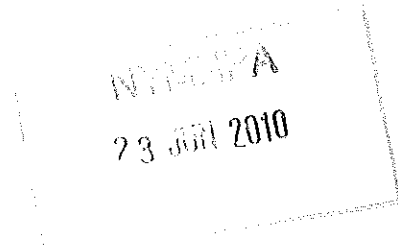
2.53 Visitors staying at the latter would be able to see the Hurrell Lane site from their accommodation units and garden area. Whilst the site is closer, it would be no more visually

intrusive from this point than the malt factory at West Knapton or Flamingoland at Kirby Misperton.

- 2.54 The actual impacts on these businesses are difficult to predict with any accuracy. They are most likely to take the form of a reduction in the proportion of repeat bookings, rather than deterring first time visitors, who would not have been aware of the pre-development position. In this event, these businesses would have to increase their marketing spend to generate a higher number of first time visits to compensate for any drop off in repeat visiting.
- 2.55 Some disruption would occur during the construction phase but, since most of the work would be undertaken during the off-season, this is unlikely to have a significant impact on tourism and any impacts are unlikely to be long-lasting. Overall, the economic benefits of the construction work are likely to out-weigh any negative impacts.
- 2.56 During the operational phase the additional input to the local economy in terms of wages, a proportion of which would be spent in local businesses, would out-weigh any possible loss of income that might be caused at a small number of businesses.

#### Mitigation

- 2.57 Whilst it is our overall conclusion that any negative economic impacts experienced would be more than made up for by the positive economic impacts described below, it is possible that the businesses described above could be affected as described.
- 2.58 One option to tackle any fall in repeat business would be to improve the quality of the current offers of these businesses – this could be achieved, for example by funding some additional landscaping in and around these businesses or providing some specific improvements, such as hot tubs or other quality improvements.



### 3 ECONOMIC IMPACT ASSESSMENT

3.1 There will be economic impacts to the local area during both the construction phase and during operation of the Ryedale Gas Project. These, and the current economic context for the impacts, are considered here.

#### Background

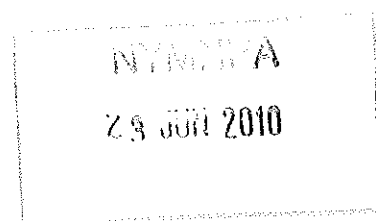
3.2 An understanding of the economic 'health' of the local community can be understood by considering data for Thornton-le-Dale ward. North Yorkshire County Council provides this information, taken from national statistics, on its website. The key indicators are employment, unemployment and the index of multiple deprivation (IMD).

#### Employment

3.3 Two thirds of employed people resident in Thornton-le-Dale are employed in full time jobs. This is lower than the average for Ryedale District, but higher than the rate for North Yorkshire. Thornton-le-Dale is ranked 11 out of 20 wards in Ryedale by this measure.

Table 9: Full Time Employment

Area	Percent
Thornton-le-Dale ward	67.1%
Ryedale District	72.7%
North Yorkshire (excluding York)	64.6%
Highest (Dales)	94.5%
Lowest (Sinnington)	47.3%
Rank in Ryedale	11/20



Source: North Yorkshire County Council Quoting Data from the Office for National Statistics and NOMIS

3.4 A relatively high proportion of employed people in Thornton-le-Dale ward are employed in the tourism industry – 14.9%, as opposed to 11.3% in Ryedale and 11.8% in North Yorkshire. Thornton-le-Dale Ward is ranked 12<sup>th</sup> out of 20 wards in Ryedale by this measure showing that a higher than average proportion of local residents are employed in the sector. Whilst these might not all work in the ward, the high rate is no doubt a reflection, to a degree of the number of tourism businesses in the ward and in neighbouring areas (including York, Scarborough and Flamingoland).

Table 10: Employment in Tourism

Area	Percent
Thornton-le-Dale ward	14.9%
Ryedale District	11.3%
North Yorkshire (excluding York)	11.8%
Highest (Sinnington)	44.2%
Lowest (Norton East)	3.5%
Rank in Ryedale	12/20

Source: North Yorkshire County Council Quoting Data from the Office for National Statistics and NOMIS

3.5 Job seekers allowance is the primary allowance paid to unemployed people who are looking for work. As such it is a measure of the number of employable people. Just 1.3% of people



in Thornton-le-Dale ward are claiming job seekers allowance, suggesting a very low rate of unemployment amongst people who want to work. This equates to approximately 40 individuals in Thornton-le-Dale ward and approximately 1,280 individuals in Ryedale District.

Table 11: Job Seekers Allowance

Area	Percent
Thornton-le-Dale ward	1.3%
Ryedale District	2.4%
North Yorkshire (excluding York)	2.8%
Highest (Malton)	4.3%
Lowest (Ampleforth)	0.7%
Rank in Ryedale	5/20

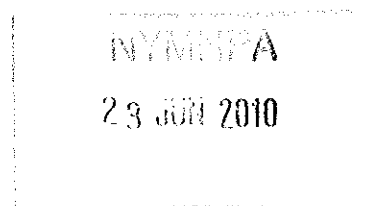
Source: North Yorkshire County Council Quoting Data from the Office for National Statistics and NOMIS

- 3.6 One in 20 in Thornton-le-Dale Ward claims benefits associated with unemployment (though this includes those who cannot work, for example disability benefit claimants). The low rate in the ward suggests that worklessness is relatively low in comparison to the district and to the region.

Table 12 People Claiming Out of Work Benefits

Area	Percent
Thornton-le-Dale ward	5.3%
Ryedale District	7.3%
North Yorkshire (excluding York)	8.8%
Highest (Sherburn)	12.2%
Lowest (Ampleforth)	2.5%
Rank in Ryedale	14/20

Source: North Yorkshire County Council Quoting Data from the Office for National Statistics and NOMIS



- 3.7 The Government's index of multiple deprivation considers a range of factors which contribute to quality of life, including health, crime, access to services, employment, etc. There are 7,932 wards in England and the index is scored with the highest score giving the best quality of life – or the lowest level of deprivation.
- 3.8 Thornton-le-Dale is ranked 4,617 (some way above the mean/median, which is 3,966. The average rank for Ryedale wards is just over average – 4,060 and the average for wards in North Yorkshire is 4,983. The highest ranked ward in Ryedale is Kirbymoorside (5,415) and the lowest is Wolds (2,161). Thornton-le-Dale is ranked 12<sup>th</sup> out of 20 of the Ryedale wards. The highest levels of deprivation are felt in the more remote rural areas (distant from service centres) and in the semi-urban wards (Pickering and Sherburn).

Table 13: Index of Multiple Deprivation

Area	Rank
Thornton-le-Dale ward	4,617
Ryedale District	4,060
North Yorkshire (excluding York)	4,983
Highest (Kirbymoorside)	5,415
Lowest (Wolds)	2,161
Rank in Ryedale	13/20

Source: North Yorkshire County Council Quoting Data from the Office for National Statistics and NOMIS

- 3.9 The average weekly income in Thornton-le-Dale ward is average for the District, but above the average for North Yorkshire and for the Yorkshire and Humber Region. It is slightly below the national average.

Table 14: Weekly Household Income

Area	£s
Thornton-le-Dale ward	£560.00
Ryedale District	£560.50
North Yorkshire (excluding York)	£538.69
Highest (Ryedale South West)	£750.00
Lowest (Pickering East)	£480.00
Rank in Ryedale	12/20

Source: North Yorkshire County Council Quoting Data from the Office for National Statistics and NOMIS

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#### Summary

- 3.10 Overall Thornton-le-Dale ward is relatively prosperous in comparison to the national average and in comparison to other wards in Ryedale and to the regional average. The ward is also relatively advantaged within the national context. A relatively high proportion of its inhabitants are employed in the tourism industry, compared to surrounding wards and whilst some of these might not work within the ward, it is the case that many do (many of the businesses consulted employ local people) and so it can be concluded that one of the reasons that Thornton-le-Dale ward is prosperous is because of its popularity with tourists.
- 3.11 The above provides a helpful baseline against which it will be possible to monitor changes in the future.

#### Employment During Construction and Operation of the Facility

##### Construction Phase

- 3.12 The construction phase of the project will require a large work force. Moorland Energy has made an estimate of the number of workers that will be required on the three construction projects – the well head, the pipeline and the processing plant, as well as the amount of time it will take to construct them. These are summarised in the table below.

Table 15: Construction Workers Summary

Project	Duration (weeks)	Maximum Staff	Minimum Staff	Average Staff
Wellsite	32	26	2	10
Pipelines	23	73	20	51
Processing Site	44	51	6	33

Source: Moorland Energy, Environmental Statement for Ryedale Gas Project

- 3.13 Based on the number of weeks and the average number of workers anticipated on site, it is possible to estimate the total quantity of work generated during the construction phase as almost 3,000 ‘worker weeks’ – that is one person working for one week.

Table 16: Estimate of Total Employment

Project	Duration (weeks)	Average Staff	Total Man-Weeks
Wellsite	32	10	320
Pipelines	23	51	1,173
Processing Site	44	33	1,452
Total	1	94	2,945

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- 3.14 Moorland operates a non-discriminatory and fair selection employment policy. For skilled and semi-skilled jobs, the right person will be sought for the required job – irrespective of gender, religion, where he/she lives, etc. To the extent that local candidates meet the jobs’ skills requirements, then they would be assured of an equal chance of selection. However, rates of employment in Thornton-le-Dale ward are high and it is unlikely that a large number of very local people will be employed during the construction phase. Similarly, rates of employment in Ryedale District are relatively high, though there are pockets where unemployment is higher – for example Sherburn and Malton. In reality, it is reasonable to assume that a significant proportion of the construction workers will have to be sourced from outside of the District.
- 3.15 The construction work will be contracted to several firms, all of which will have their own employment policies, so at this stage, it is not possible to estimate the proportion of construction workers sourced from the local (Ryedale) labour market with any great accuracy and so the consultants have made an estimate, based on what they believe to be reasonable assumptions, as follows
- 25% of construction workers will be employed from within Ryedale District
  - 75% of construction workers will be employed from outside of Ryedale District
  - Of those employed from outside of Ryedale District, a third (25% of the total) will commute from neighbouring districts and two thirds (50% of the total) will require accommodation in the area
- 3.16 It is, therefore, possible to estimate the ‘worker-weeks’ generated by each of these ‘geographic’ categories of workers. It is important to understand this profile as it will determine where and how the economic impacts of employment during the construction phase are felt.

Table 17: Workforce Profile

Category	Number of Workers	Worker Weeks
In Ryedale	24	736
Commuting from adjacent districts	23	736
Requiring temporary accommodation	47	1,473
Total	94	2,945

3.17 Moorland Energy's construction contractors will comply with the employment terms and conditions set down in the National Agreement for the Engineering Construction Industry (NAECI). This specifies rates of pay for construction workers. This has been used to estimate an average weekly pay value of £459. This is based on the following:

- 38 hour normal working week
- £10.53 per hour – the rate for a grade 3 worker (of 6 available grades)
- 4 hours of overtime per week average
- £14.72 per hour – rate for a grade 3 worker

Local and Commuting Workers

3.18 From this it is possible to value the employment generated for workers who live in Ryedale and adjacent districts as follows:

- In Ryedale - £337,824
- In adjacent districts - £337,824

Workers Requiring Temporary Accommodation

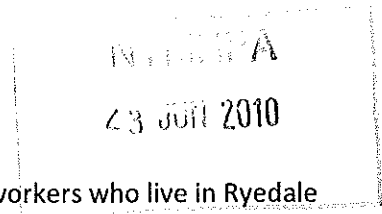
3.19 The remaining £675,648 of wages will be paid to workers from away. Whilst much of this will be lost from the local economy, a proportion will find its way back through payment for accommodation and subsistence. In order to estimate this, the following assumptions have been made:

- Workers will stay in B&B accommodation
- They will stay for four nights per week

3.20 According to Welcome to Yorkshire (see Tables 2-4, above), the average spending by business visitors in Ryedale is £333 per trip (£1,000,000/3,000 trips) and £207 per day (£12,000,000/58,000 days). However, construction workers will be staying in lower cost accommodation (B&Bs) than business tourists in general (who will use a range of accommodation types and standards) and are also likely to spend less than average for this category of visitor. We therefore estimate average spend per construction worker per night stayed at £50 – including accommodation, meals, fuel and incidental spending (i.e. newspapers, drinks, replacements, etc).

3.21 From this, it is possible to estimate the total spending in the local economy by construction workers who stay locally during the week as £294,600 calculated as follows:

- 1,473 worker weeks x 4nights x £50 = £294,600



- 3.22 A reasonable economic multiplier for tourism spending in a rural area such as Ryedale is 1.25 – i.e. every £1 spent by visitors to the area generates £1.25 of spending in the local economy. It is possible to estimate this ‘induced’ spending in this case as £73,650. This means that the total value of temporary workers to the local economy can be estimated at £368,250 during the construction phase.
- 3.23 The estimated total economic impact of the construction phase is summarised in the table below.

Table 18: Construction Phase Economic Impact

Category	Value	Location
In Ryedale	£337,824	In Ryedale
Commuting from adjacent districts	£337,824	Mostly in adjacent districts
Requiring temporary accommodation	£368,250	In Ryedale
<b>Total</b>	<b>£1,043,898</b>	<b>In Ryedale and adjacent districts</b>

- 3.24 The estimated economic impact of the construction phase is likely to be conservative. It does not include additional nights’ accommodation sought by workers who live too far away to travel to work from home on Monday morning, nor does it include any materials and services (for example haulage) that might be sourced locally

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Operations Phase

- 3.25 Moorland Energy estimates that it requires 20 – 25 staff members to operate the proposed facility. The company has budgeted for an average annual salary for these staff of £23,000 - £25,000 at present prices, based on current industry pay levels.
- 3.26 It is possible to estimate the economic impact (in terms of wages) during the operational phase, therefore, at between £460,000 and £625,000. It is thought that most of the staff employed at the project would live within a short distance of the site and so most of the above impact is likely to be felt in the Ryedale area, with a proportion (as yet unknown) in neighbouring districts.
- 3.27 Although some of these posts might be recruited locally, given the employment position already described, it is thought that at least half of these staff will be recruited from elsewhere and attracted to the Ryedale area. This will bring additional people to support local services, including shops, schools, restaurants, etc.
- 3.28 The company also proposes to employ additional administration staff and offer apprenticeships for young people. At present the full details of these posts are not known in detail and so they have been omitted from the economic impact assessment for the present.

**Conclusions**

Construction Phase

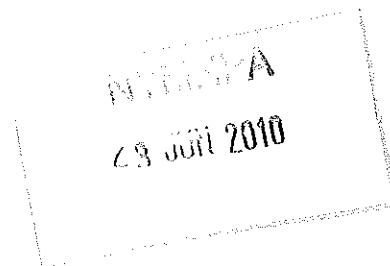
- 3.29 A minimum of £1,000,000 (at 2008 prices) of direct and indirect spending would be generated by staying construction workers in the local area. This will be spent mostly on

accommodation, food and other, incidental spending. At least half of this expenditure would be felt in close proximity to the project area (construction workers requiring temporary accommodation) and three quarters would be felt in Ryedale District.

- 3.30 When more is known about the awarding of contracts for haulage, landscaping, etc, it is likely that this figure will rise as contracts awarded to locally-based businesses would be added to the total.

Operations Phase

- 3.31 The operational phase would create 23-25 new full time equivalent jobs with an estimated annual salary spend of £460,000 - £625,000 at 2008 prices.



**4 CONCLUDING REMARKS**

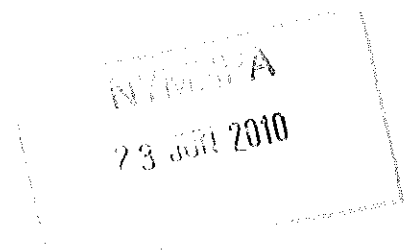
4.1 It is the professional opinion of the consultants, based on the research undertaken and subsequent analysis that:

- Negative impacts on tourism during the construction phase would be minor and short-lived
- There would be a significant positive economic impact in the local area during the construction phase
- Overall, the project is unlikely to have significant negative impacts on the tourism economy of the Ryedale area or of the villages in the project area – Ebberston, Allerston, Wilton and Thornton-le-Dale
- A small number of businesses might experience some negative impact on repeat business, but mitigation proposals are made which should more than compensate for this impact
- There would be a significant positive economic impact during the operational phase, which is likely to last in the region of 20 years

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**APPENDIX**

- 1 Consultees**
- 2 List of businesses**
- 3 List of Projects – Bowles Green Limited**





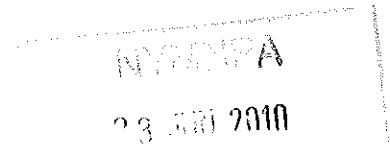
## **Appendix 1: Consultees**

### Tourism Management Organisations

Yorkshire Moors and Coast Tourism Partnership, Mark Kibblewhite, Brand and Research Manager  
Ryedale District Council, Craig Natrass, Tourism Manager  
Tourism Association North Yorkshire, Joan Lovejoy, Secretary

### Tourism Businesses

Balderstones, Thornton-le-Dale, Claire and William  
Banavie B&B, Thornton-le-Dale, Ella Bowes  
Black Swan Hotel and Restaurant, Pickering, Ian Taylor  
Brandynaps Bistro, Thornton-le-Dale, Adam White  
Bridge Foot House, Thornton-le-Dale, Ian Stephenson  
Easthill Farm Holiday Cottages, Thornton-le-Dale, Diane and James Stenton  
The Buck Inn, Thornton-le-Dale, Jane Tiffany  
The Grapes, Ebberston, Duncan Harper  
Mystic Arts, Thornton-le-Dale, Paul Kemp  
Newton Cottage, Pickering, Mrs Danks  
The Old Forge Holiday Cottages, Wilton, Judy French  
Old Station Holiday Cottages, Allerston, Carol Benson  
Potdoodles, Thornton-le-Dale, Natasha Halkyard  
Prospect Farm Cottages, Wilton, Graham Webster  
Sands Farm Country Cottage, Wilton, Michael Parkin  
Scarscroft B&B, Thornton-le-Dale, Jerry Scar  
Stable Gallery, Thornton-le-Dale, Brent Allman  
Station House Holiday Cottage and Caravan Park, Thornton-le-Dale, Natalie  
Studley House Farm B&B/Cottages, Ebberston, David Green  
Summertree Farm Holiday Cottages, Low Marishes, Bob Eldridge  
Tanglewood, Thornton-le-Dale, name withheld  
Wardill Bros, Thornton-le-Dale, John Garbutt  
The Workshop, Ebberston, Chris Rhodes  
Warrington Tea Room & B&B, Thornton-le-Dale, Jonathan and Jane Rule



Appendix 2: Tourism Businesses in the Surrounding Area

NAME	TOWN	POSTAL CODE	TELEPHONE	WEBSITE
111 Eastgate	Pickering		01751 471409	<a href="http://www.holidaypickering.co.uk/">http://www.holidaypickering.co.uk/</a>
17 Burgate	Pickering	YO18 7AU	01751 473463	<a href="http://www.17burgate.co.uk/">http://www.17burgate.co.uk/</a>
Apricot Lodge	Pickering	YO18 7EX	01751 477744	<a href="http://www.apricotlodge.com/">http://www.apricotlodge.com/</a>
Ashfield Cottages	Lockton	YO18 7PZ	01751 460218	<a href="http://www.ashfieldcottages.com/">http://www.ashfieldcottages.com/</a>
Ashfield House	Pickering	YO18 7HN	01751 477429	<a href="http://www.ashfield-house.co.uk">http://www.ashfield-house.co.uk</a>
Banavie B&B	Thornton le Dale	YO18 7SX	01751 474616	<a href="http://www.banavie.uk.com/">http://www.banavie.uk.com/</a>
Black Bull Caravan Park	Pickering	YO18 8EA	01751 472 528	<a href="http://www.caravanparksnorthyorkshire.com/">http://www.caravanparksnorthyorkshire.com/</a>
Brentwood House	Pickering	YO18 7DY	01751 477233	<a href="http://www.brentwoodhousepickering.co.uk/">http://www.brentwoodhousepickering.co.uk/</a>
Bridge House	Pickering	YO18 8DT	01751 477234	<a href="http://www.bridgehousepickering.com/">http://www.bridgehousepickering.com/</a>
Brooklands	Bromton by Sawdon	YO13 9DS	01944 710395	<a href="http://www.visitbrooklands.co.uk/">http://www.visitbrooklands.co.uk/</a>
Castlegate Coach House Holiday Cottages	Pickering	YO18 7AX	01751 474796	<a href="http://www.castlegatcoachhouse.co.uk/">http://www.castlegatcoachhouse.co.uk/</a>
Cawthorne House	Pickering	YO18 7DU	01751 477364	<a href="http://www.cawthornehouse.com/">http://www.cawthornehouse.com/</a>
CDK Fabrica	Pickering		020 8123 1992	<a href="http://www.cottages-and-castles.co.uk">www.cottages-and-castles.co.uk</a>
Cherry Garth	Thornton le Dale	YO18 7QH	01751 473404	<a href="http://www.cherrygarthholidays.co.uk/">http://www.cherrygarthholidays.co.uk/</a>
Chestnut Cottage B&B	Eberston	YO13 9PA	01723 859416	<a href="http://www.chestnutcottagebandb.com/">http://www.chestnutcottagebandb.com/</a>
Clent House Guest House	Pickering	YO18 7AU	01751 477928	No Site
Cliff House Country Cottages	Eberston	YO13 9PA	01723 859440	<a href="http://www.cliffhouse-cottageholidays.co.uk/index.htm">http://www.cliffhouse-cottageholidays.co.uk/index.htm</a>
Cow Pasture & Swallow-Tail Cottages	Eberston	YO13 9NR	01723 859285	<a href="http://www.studleyhousefarm.co.uk/">http://www.studleyhousefarm.co.uk/</a>

NAME	TOWN	POSTAL CODE	TELEPHONE	WEBSITE
Crossways Hotel	Pickering	YO18 7DW	01751 472804	<a href="http://www.thecrosswayshotel.com/">http://www.thecrosswayshotel.com/</a>
Dalby Forest Lodges	Pickering	YO18 7LT	01751 460391	<a href="http://www.dalbyforestlogcabins.co.uk/">http://www.dalbyforestlogcabins.co.uk/</a>
Eastgate Cottage Limited	Pickering	YO18 7DW	01751 476653	<a href="http://www.eastgatecottages.co.uk">www.eastgatecottages.co.uk</a>
Easthill Farm House & Lodges	Thornton le Dale	YO18 7QP	01751 474561	<a href="http://www.easthill-farm-holidays.co.uk/">http://www.easthill-farm-holidays.co.uk/</a>
Eleven Westgate	Pickering	YO18 8BA	01751 475111	<a href="http://www.elevenwestgate.co.uk/">http://www.elevenwestgate.co.uk/</a>
Farfields Farm B&B	Lockton	YO18 7NQ	01751 460239	<a href="http://www.farfieldsfarm.co.uk/">http://www.farfieldsfarm.co.uk/</a>
Forest & Vale	Pickering	YO18	01751 472722	<a href="http://www.bw-forestandvalehotel.co.uk/">http://www.bw-forestandvalehotel.co.uk/</a>
Foxholm B&B	Sawdon	YO13	01723 859743	<a href="http://www.foxholmsawdon.co.uk/">http://www.foxholmsawdon.co.uk/</a>
Foxholm Hotel	Eberston	YO13 9NJ	01723 859550	No Site
Geasea Holiday Cottage	Sawdon	YO13 9DU	01723 850375	<a href="http://geaseacottages.co.uk/">http://geaseacottages.co.uk/</a>
Givendale Head Farm	Snainton	YO13	01723 859721	<a href="http://www.givendaleheadfarm.co.uk/">http://www.givendaleheadfarm.co.uk/</a>
Grindale House B&B	Pickering	YO18 7DW	01751 476636	<a href="http://www.grindalehouse.com/">http://www.grindalehouse.com/</a>
Headon Farm cottages	Bromton by Sawdon	YO13 9DG	01723 859019	<a href="http://www.headonholidaycottages.co.uk/">http://www.headonholidaycottages.co.uk/</a>
High Rigg Farm Campsite	Dalby	YO18 7LP	01751 460269	<a href="http://www.ukcampsite.co.uk/sites/details.asp?revid=5542">http://www.ukcampsite.co.uk/sites/details.asp?revid=5542</a>
Hill Croft	Thornton le Dale			
Hillrise Cottage	Newton upon Rawcliffe	YO18 8QA	01751 473 183	<a href="http://www.millionpoundlake.co.uk">www.millionpoundlake.co.uk</a>
Hungate Cottages	Pickering	YO18 7ET	01751 476382	<a href="http://www.hungatecottages.co.uk/">http://www.hungatecottages.co.uk/</a>
Jasmine Caravan Park	Snainton	YO13 9BE	01723 859240	<a href="http://www.jasminepark.co.uk">www.jasminepark.co.uk</a>
Karen's Cottages	Pickering	YO18 7HT	01751 473258	

NAME	TOWN	POSTAL CODE	TELEPHONE	WEBSITE
Keldlands Farm Cottages	Newton Upon Rawcliffe	YO18 8JP	01751 477656	<a href="http://www.keldlandsfarmcottages.co.uk">www.keldlandsfarmcottages.co.uk</a>
Kirkby House	Thornton le Dale	YO18 7RT	01751 475181	
Kirkham Garth	Pickering	YO18 7AT	01751 474931	<a href="http://www.kirkhamgarth.co.uk/">http://www.kirkhamgarth.co.uk/</a>
Kirklea Cottage				
Laurel Bank B&B	Pickering	YO18 8AP	01751 476399	<a href="http://www.laurelbankpickering.co.uk/">http://www.laurelbankpickering.co.uk/</a>
Let's Holiday	Newton upon Rawcliffe	YO18 8QA	01751 475396	<a href="http://www.letsholiday.com/index.html">www.letsholiday.com/index.html</a>
Lilac Farm Cottages	Levisham	YO18 7NL	01757 460281	<a href="http://www.lilac-farm.co.uk/">http://www.lilac-farm.co.uk/</a>
Little Barn	Lockton	YO18 7PY	01751 460325	<a href="http://www.thelittlebarn.info">www.thelittlebarn.info</a>
Lockton YHA	Lockton	YO18 7PY	01751 460376	<a href="http://www.ldwa.org.uk/ldp/members/show_supplier.php?supplier_id=1775">http://www.ldwa.org.uk/ldp/members/show_supplier.php?supplier_id=1775</a>
Lowther House	Pickering	YO18 8JL	01751 467157	<a href="http://www.lowtherhouse.org.uk/index.html">http://www.lowtherhouse.org.uk/index.html</a>
Maple Cottage	Ebberston	YO13 9PA	01226 386500	<a href="http://www.northyorkshircottages.net">www.northyorkshircottages.net</a>
Moorland Hotel	Levisham	YO18 7NL	01751 460229	<a href="http://www.moorlandslevisham.co.uk">www.moorlandslevisham.co.uk</a>
Nestfield Cottage	Ebberston	YO13 9NJ	01530 416094	<a href="http://www.cottageguide.co.uk/nestfieldcottage/">http://www.cottageguide.co.uk/nestfieldcottage/</a>
Newton Cottage	Pickering	YO18 8BZ	01751 477913	No Site
No 9 Luxury B&B	Pickering	YO18 7HZ	01751 476533	<a href="http://www.no9pickering.co.uk/">http://www.no9pickering.co.uk/</a>
Noelle's Cottages	Pickering	YO18 8NX	01751 472283	<a href="http://www.noellescottages.co.uk">www.noellescottages.co.uk</a>
Overbrook Caravan Park	Thornton le Dale	YO18 7SE	01751 474417	<a href="http://www.overbrookcaravanpark.co.uk/">http://www.overbrookcaravanpark.co.uk/</a>
Prospect Farm Cottages	Wilton	YO18 7JY	01751 474584	<a href="http://www.prospectfarmcottages.co.uk/">http://www.prospectfarmcottages.co.uk/</a>
Rains Farm Holidays	Allerston	YO18 7PQ	01723 859333	<a href="http://www.rains-farm-holidays.co.uk/">http://www.rains-farm-holidays.co.uk/</a>
Recommended Holiday Cottages	Pickering	YO18 7DW	01751 475547	
Rosebank B&B				
Sands Farm Country Cottage	Wilton	YO18 7JY	01751 474405	<a href="http://www.sandsfarmcottages.co.uk/">http://www.sandsfarmcottages.co.uk/</a>

NAME	TOWN	POSTAL CODE	TELEPHONE	WEBSITE
Scarscroft B&B	Thornton le Dale	YO18 7TE	01751 476601	<a href="http://www.scarscroft.co.uk/">http://www.scarscroft.co.uk/</a>
Southmoor Farm B&B	Nr Scarborough	YO13 0LW	01751 460285	<a href="http://www.southmoorfarm.co.uk">www.southmoorfarm.co.uk</a>
Station Hotel	Pickering	YO18 7AJ	01751 472171	No Site
Station House Holiday Cottages	Thornton le Dale	YO18 7SE	01751 474417	<a href="http://www.stationhousecottages.co.uk/index.htm">http://www.stationhousecottages.co.uk/index.htm</a>
Studely House Farm	Ebberston	YO13 9NR	01723 859285	<a href="http://www.studleyhousefarm.co.uk/">http://www.studleyhousefarm.co.uk/</a>
Summertree Farm Holiday Cottages	High Marishes	YO17 6UH	01751 474625	<a href="http://www.summertree.co.uk/">http://www.summertree.co.uk/</a>
Sunset Cottage	Newton upon Rawcliffe	YO18 8QF	01751 472172	<a href="http://www.boonhill.co.uk/sunset.htm">http://www.boonhill.co.uk/sunset.htm</a>
Tangalwood	Thornton le Dale	YO18 7SX	01751 474688	
Tantara Woodland Lodges				
The Old Station	Allerston	YO18 7PG	01723 859024	<a href="http://www.theoldstationallerston.co.uk/">http://www.theoldstationallerston.co.uk/</a>
The Black Swan Hotel	Pickering	YO18	01751 472286	<a href="http://www.blackswanpickering.co.uk/index.htm">http://www.blackswanpickering.co.uk/index.htm</a>
The Cayley Arms	Bromton by Sawdon	YO13 9DA	01723 859372	<a href="http://www.wheresbest.co.uk/venue/160881/Cayley-Arms/">http://www.wheresbest.co.uk/venue/160881/Cayley-Arms/</a>
The Granary	Newton upon Rawcliffe	YO18 8QA	01751 467188	<a href="http://www.granarymanorfarm.co.uk">www.granarymanorfarm.co.uk</a>
The Hawthornes	Middleton	YO18 8PB	01751 474755	<a href="http://www.thehawthornes.co.uk/">http://www.thehawthornes.co.uk/</a>
The New Inn	Cropton	YO18 8HH	01751 417330	<a href="http://www.newinncropton.co.uk/">http://www.newinncropton.co.uk/</a>
The Old Forge	Wilton	YO18 7JY	01751 477399	<a href="http://www.forgecottages.co.uk/">http://www.forgecottages.co.uk/</a>
The Old Manse	Pickering	YO18 8AL	01751 476484	<a href="http://www.oldmansepickering.co.uk/">http://www.oldmansepickering.co.uk/</a>
The Peacock Hotel	Snainton	YO13 9AJ	01723 859257	<a href="http://www.beerinthevening.com/pubs/s/26/26214/Peacock/Snainton">http://www.beerinthevening.com/pubs/s/26/26214/Peacock/Snainton</a>
The White Swan	Pickering	YO18	01751 472288	<a href="http://www.white-swan.co.uk/">http://www.white-swan.co.uk/</a>
Town End Farm Cottage	Pickering	YO18 7HU	01751 472713	<a href="http://www.townendfarmholidays.co.uk/">http://www.townendfarmholidays.co.uk/</a>

NAME	TOWN	POSTAL CODE	TELEPHONE	WEBSITE
Troutdale Lodge	Nr Scarborough	YO13 OBS	01723 882209	<a href="http://www.troutdalelodge.com/">http://www.troutdalelodge.com/</a>
Upper Carr Chalet & Touring Park	Pickering	YO18 7JP	01751 473115	<a href="http://www.uppercarrchaletandtouringpark.co.uk/caravan-parks-north-yorkshire/">http://www.uppercarrchaletandtouringpark.co.uk/caravan-parks-north-yorkshire/</a>
Vale Pickering Caravan Club	Allerston	YO18 7PQ	01723 859280	<a href="http://www.valeofpickering.co.uk/">http://www.valeofpickering.co.uk/</a>
Vivers Mill Guest House	Pickering	YO18 8DJ	01751 473640	<a href="http://www.viversmill.co.uk/">http://www.viversmill.co.uk/</a>
Warrington Guest House	Thornton le Dale	YO18 7RY	01751 475028	<a href="http://www.warringtonhouse.co.uk/">http://www.warringtonhouse.co.uk/</a>
White Lodge Cottage	Pickering	YO18 7DU	01751 473897	<a href="http://www.bigripper-yorkshire.co.uk/self_catering/pickering/white_lodge_cottage_98149.htm">http://www.bigripper-yorkshire.co.uk/self_catering/pickering/white_lodge_cottage_98149.htm</a>
Wolds End Holiday Cottages	Rillington			<a href="http://www.woldsendcottages.co.uk/">http://www.woldsendcottages.co.uk/</a>

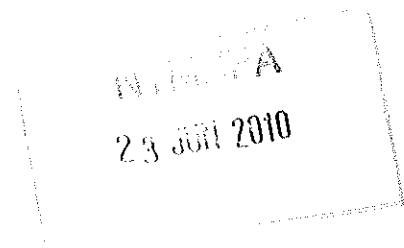
Note: This list is not comprehensive, but it includes most of the tourism businesses in the area; it was researched using appropriate Google searches.

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### **Appendix 3: Bowles Green Limited: List of Consultancy Projects**

#### **Research and Intelligence**

- Northumberland National Park – focus groups and pilot projects to determine effective methods to interpret the landscape of Hadrian’s Wall Country
- Windermere Enhancement Scheme – baseline study of businesses
- Countryside Mapping - scoping study to understand current practice, scientific research and new technology
- Maryport Maritime Visitor Attraction – market testing of proposed content
- Redcar & Cleveland Borough – visitor survey
- Lincolnshire County Council – questionnaire survey and focus groups to guide rights of way planning
- North Pennines AONB/Geopark – focus groups to guide marketing planning
- Solway Coast AONB – focus groups to guide advice of branding strategy
- Capital Region Tourism – developing a standard evaluation methodology for events
- Lake District National Park – researching users’ attitudes towards 4x4 management regimes on upland tracks; interview survey and focus groups
- Cross Lakes Shuttle – user survey (2002, 2003 & 2004)
- Howardian Hills AONB – visitor survey and tourism audit
- Cumbria Tourist Board – survey of tourism employee learning needs
- Countryside Agency – assessing the demand for off-road cycling in Lancashire
- Countryside Agency – assessing the demand for countryside recreation in the Lake District National Park
- The Rum Story, Whitehaven – visitor survey
- Nidderdale AONB – visitor research
- Lincolnshire Wolds AONB – survey of businesses
- West Cumbria Tourism Initiative – visitor attitudes research
- Kangol Factory Shop – analysis of visitor survey, advice on future market research
- Talkin Tarn Country Park – interviews with users
- Ridgeway National Trail – interviews with businesses
- West Cumbria – cyclists interview survey
- Wildfowl & Wetlands Trust - visitor surveys at 8 sites
- Scottish Deer Centre - visitor survey
- Banham Zoo – visitor survey and focus groups
- Shrewsbury Quest - visitor survey
- Rowley’s House Museum, Shrewsbury – visitor survey
- White Rose Line, York - customer survey
- National Trust (North West Region) - visitor surveys at 5 countryside sites
- National Trust (Yorkshire Region) – visitor surveys at 6 countryside sites
- Blackburn Borough Council - visitor survey
- Yorkshire Water - two focus groups
- Scottish Long Distance Routes - focus groups
- English & Welsh National Trails - focus groups
- Rank Leisure proposed Oasis Holiday Village – pre-development site usage survey
- Cumbria Outdoors - telephone survey
- National Parks Marketing Study- postal survey of 8,000 businesses
- National Parks Craft and Food Products Study – postal survey



## Policy, Strategies and Plans

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- Durham World Heritage Centre – tourism masterplan
- Nevis Partnership – review of the Nevis Strategy (Ben and Glen Nevis)
- Conwy & Denbighshire – tourism strategy for coastal and inland waterways (with Hyder Consulting)
- North West Coastal Trail – strategic positioning report
- Lancashire – identifying and piloting ways of encouraging ethnic minority communities to cycle
- Wales Coastal Tourism Strategy – national coastal tourism study (with Hyder Consulting)
- Egremont & Area – tourism strategy and action plan
- Cardigan Bay – strategic and sustainable framework for coastal recreation (with Hyder Consulting)
- Northumberland Coast AONB – sustainable tourism strategy (with QA Research)
- North Lincolnshire Coast – eco-tourism study, strategy and business plan
- Islands of Barrow – tourism masterplan
- Five Counties – events scoping study and development strategy
- Redcar & Cleveland – review of potential for activity tourism, producing an activity tourism strategy and implementation of activity tourism initiative
- Ribble Estuary NNR – tourism study (with Woollerton Dodwell Associates)
- North Cumbria – natural history tourism development strategy
- West Pennine Moors – sustainable recreation and tourism strategy
- Swale & Ure Washlands – recreation and tourism strategy
- Whitehaven – review of tourism product and marketing, forward strategy
- Market Weighton – tourism action plan for Market Towns Initiative
- Nidderdale AONB – sustainable tourism strategy and assistance with implementation
- Humber Estuary Partnership – sustainable tourism study
- Rhondda Fawr – equestrian tourism feasibility study and development strategy
- National Museums of Kenya – development/marketing plans for six flagship sites
- West Cumbria Cycle Network – development and marketing strategy
- Cleator Moor & Ehen Valley – sustainable tourism development plan
- West Cumbria – sustainable tourism strategy and cycle tourism demonstration project
- Bonaire, Caribbean – feasibility study and development plan for birdwatching tourism (with the Tourism Company)
- National Trust – minibus tour programme & public transport schemes in Lake District
- 22 Natural Parks in Andalucia, Spain – sustainable tourism development plan
- Kent – walking tourism marketing strategy
- East Lothian – walking tourism strategy
- Yorkshire Wolds – Planning and implementing walking tourism campaign
- Alston Moor – development plan (with the Tourism Company)
- Humber Estuary – planning and implementing birdwatching tourism project
- Shropshire – developing and promoting walking holidays
- Monts d’Aree Parque Natural, Brittany – sustainable development strategy
- The Falkland Islands – tourism development strategy, planning and implementing world-wide marketing, training, adviser to Tourist Board
- Kielder – tourism marketing strategy, sports and events strategy

## Business

- RSPB Bempton – feasibility study of developing this nature reserve into the National Seabird Centre
- Watson Bird Centre – scoping study, concept development and business planning



- Durham World Heritage Site – business plan for new visitor centre
- Hartlebury Castle, Worcestershire – scoping study and options for future management
- Northern Uplands Sense of Place Project – producing a toolkit for rural community heritage projects
- Lake District National Park Visitor Centre – consultation, appraisal of options, concept development and business planning
- First for Festivals – strategic advice to Tees Valley events programme
- RSPB Saltholme – business plan for new flagship nature reserve
- Guisborough Forest – feasibility study for mountain bike centre
- Jonathan Swift House, Whitehaven – feasibility study
- The Earth Centre – financial & operational review; advice of attraction's future
- Barrow Submarine Heritage Centre – review of business plan and business planning advice (x2)
- Hidden Britain – producing interpretation guidance notes
- Silloth Airfield – feasibility study
- The Green Quay – business and development plan for environmental visitor centre
- Holme Styes Wood – scoping/feasibility study for forest village & associated facilities
- Rhondda Heritage Railway – feasibility study for a heritage steam railway, including assessing development sites, market research and funding strategy
- Dog Kennel Wood Community Nursery, Kendal, Cumbria – business plan
- Near Lane Barn – feasibility study and business planning for a camping barn on cycle route at Meltham, West Yorkshire
- Sustainable Tourism Toolkit – researching and producing elements of the English Tourism Council's guidance on sustainable tourism
- Talkin Tarn Country Park, Brampton – development and business planning, retail and merchandising, including public consultation
- The EcoTech Centre, Swaffham – feasibility study, business plan for environmental technology visitor attraction and training centre
- Rye Harbour Martello Tower – visitor and education centre feasibility study
- The Woodland Enterprise Centre, Sussex – feasibility study for workspace and visitor attraction, input to planning application, merchandising of woodland products
- North Queensferry Funicular Railway – feasibility study
- Walking Tourism Toolkit – researching and producing a walking tourism development toolkit for the English Tourism Council
- Cluny Clays Activity Centre, Fife – development plan, marketing planning and business planning
- Edinburgh Transport Museum – feasibility study including business plan and evaluation of possible development sites
- Lothian and Edinburgh – study of possible sites for theme park development and proposal for potential developers
- Ballater Railway Station, Royal Deeside – visitor centre and tourist information centre feasibility study
- Barn Elms Wildfowl and Wetlands Centre, London – visitor number and traffic flow projection for planning application
- Evesham – visitor attraction feasibility study and development strategy
- Morecambe Bay Discovery Centre – feasibility study and development planning
- Essex Filter Beds, Lea Valley Regional Park – heritage centre feasibility study
- Bede Museum, Jarrow – feasibility study and interpretative plan

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### **Marketing**

- Solway Coast and Plain – highway signage and branding strategy
- RSPB Saltholme – marketing strategy and plan
- Billingham International Folklore Festival – marketing strategy

- North Pennines UNESCO Global Geopark – marketing strategy and audience development plan
- Solway Coast – tourism marketing strategy
- Countryside Council for Wales – strategy for marketing National Nature reserves
- Countryside Council for Wales – communications strategy
- Davy Down Pumping Station – education marketing strategy
- Countryside Commission – public communications strategy (with Geoff Broome Associates)
- The National Trust, Yorkshire Region – countryside marketing strategy
- Countryside Commission – Marketing Strategy for National Trails
- The National Trust, North West Region – countryside marketing strategy, minibus tour programme
- Banham Zoo – marketing strategy; managing delivery of strategy, staff training
- Suffolk Wildlife Park – marketing strategy
- The Scottish Deer Centre, Fife – marketing strategy, working with client to deliver
- Rufford Old Hall, Lancashire – development and marketing plan
- Countryside Commission – marketing and promotion study of National Parks
- The Wildfowl & Wetlands Trust – marketing strategy for nine visitor centres; working with client to establish a marketing management system
- Kielder Forest – marketing strategy; sports and events strategy
- Lancashire’s Hill Country – marketing strategy
- The Black Country – marketing and product development strategy
- Falkland Islands – marketing strategy, running a marketing office in the UK and implementing a marketing plan in the UK, Europe and North America

#### **Funding**

- Auckland Castle Park – audience development plan and training plan
- Middleton Park, Leeds – audience development and access plans
- Wey Valley Landscape Partnership – access and audience development plan
- Redcar & Cleveland Activity Tourism Initiative – single programme bid
- Carr Lodge Park, Wakefield – audience development plan
- Barrow Submarine Heritage Centre – review of business plan; work to strengthen business plan for funding application
- Pannett Park, Whitby – audience development plan
- North East England Mining Archive – audience development plan
- Towneley Hall and Park – audience development and access plan to support HLF bid
- North Pennines AONB – audience development plan to support HLF bid
- Bassenthwaite Lake Restoration Project – landscape character assessment, heritage report, access plan, audience development plan and training plan to support HLF bid
- British Horse Society – producing fundraising guidance notes for bridleways management by BHS volunteer groups
- Forest of Bowland AONB – Landscape Partnership Scheme HLF bid
- Countryside Council for Wales – Objective 1 bid for visitor facilities and marketing of National Nature Reserves
- Pillar and Ennerdale SSSI – funding strategy for rebuilding of boundary wall - Forest Enterprise
- Ridgeway and Thames Path National Trails – research into willingness of businesses to pay for inclusion in trail guides
- Birds of the Humber Trust – corporate sponsorship, events and visitor payback
- Peak District Tourism and Environment Trust – assisting in setting up a visitor payback scheme using a variety of collection methods
- National Trust (North West Region) – planning and delivering the Centenary fundraising campaign in the Northwest

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- South Yorkshire Air Museum – funding strategy
- The National Museums of Kenya – funding strategy
- Park Bridge Visitor Centre Heritage – proposals for HLF bid
- West Midlands canal network – HLF bid
- Countryside Agency - producing fundraising guidance notes for 'Walking for Health' schemes
- Romney Marsh Gateway Centre – concept, outline gateway strategy & Life fund bid
- Kent's Country Parks – development plan to optimise visitor revenue

### **Evaluation**

- Bishop Auckland – economic impact assessment, evaluation framework and evaluations of Renaissance Regeneration Programme
- Windermere – evaluating the impacts of the Windermere Town Enhancement Scheme
- Durham Riverbanks Gardens – economic impact assessment
- Egremont – monitoring the effectiveness of the Egremont Area Regeneration Partnership
- Lake District National Park Authority – Reviewing the effectiveness of publications
- RSPB Saltholme – economic impact assessment
- Copeland Borough – review of Tourist Information Centre service
- Cross Lakes Shuttle – monitoring the effectiveness of the project
- Wyre Borough – review of Tourist Information Centre service
- Hampshire Walking Festival 2002 – economic impact assessment
- Whitehaven Tall Ships – economic impact assessment of the Tall Ships visit to West Cumbria 2002
- National Trails - telephone research and postal surveys to evaluate the effectiveness of different methods of promoting walking holidays

### **Access and Recreation Planning**

- Stockton-on-Tees – rights of way improvement planning
- Darlington – rights of way improvement planning advice
- Middlesbrough – rights of way improvement planning advice
- Ormskirk – Skelmersdale Cycle Path – feasibility study and consultation
- South West Wales Coast – coastal recreation audit for Pembrokeshire, Carmarthen, Swansea and Neath Port Talbot
- Redcar & Cleveland – Rights of Way Improvement Plan
- Earby & Barnoldswick Multi-user route – feasibility study and consultation
- Lune Valley Cycle Path extension – feasibility study and consultation
- Arnside & Silverdale AONB – access and interpretation strategy
- Countryside Agency – recreation planning study for the South Pennines (with Woollerton Dodwell Associates)
- Lake District Oasis Holiday Village – activity and access strategy
- Northern Ireland – access strategy (with Peter Scott Planning Services)

### **Other**

- Breamish Valley – researching, recording and specifying installation for a 'sound trail'
- Tendring – review of tourism policies in the Tendring Local Plan
- Essex – review of tourism policies in joint Essex & Southend-on-Sea Structure Plan
- English Nature – a review of sustainable tourism & policy advice
- Eagle Hall Wood, Pateley Bridge – advice and assistance with product development, community consultation and planning application

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- The Kennett and Avon Canal – visitor management and public transport strategy (with Geoff Broom Associates)
- Natural History Museum – feasibility study into generating revenue from fossil replicas
- Countryside Commission – crafts and food in National Parks product
- North York Moors National Park – setting up the Brigantia crafts and food brand
- Forestry Commission – retail and merchandising development plan
- Woodland Enterprise Centre – merchandising strategy
- National Trust Centenary – advice on associated merchandise
- Beringar Ltd – merchandising strategy
- Falkland Islands Development Corporation – road show of Falklands produce
- Barrow Submarine Heritage Centre – interpretation proposals
- Crimdon Park and Dene (Durham Heritage Coast)
- Arnside/Silverdale AONB – Interpretation plan for limestone heritage
- The Mappa Mundi, Hereford Cathedral
- Meanwood Valley Urban Farm, Leeds
- The EcoTech Centre, Swaffham
- Park Bridge Heritage Centre, Ashton-under-Lyne
- The Dock Museum, Barrow-in-Furness
- The Tourist Information Centre, gateway exhibition, Rochester
- Great Western Community Forest
- Brockhill Country Park Visitor Centre, Kent
- The Shrewsbury Quest
- Concept designs for Ballater Railway Station and Station Square, Royal Deeside

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