

Introduction

The visitor economy – big business for Yorkshire

The visitor economy is a key industry for Yorkshire. In 2007 the visitor economy contributed £6.3bn or 8.5% of the region's total output - a high proportion compared to the national average. This output has grown by 50% in the last 10 years. The sector employs 243,500 people, of which 51% work full time, in over 20,000 businesses.

Yorkshire Forward's Regional Economic Strategy for Yorkshire & Humber 2006-2015 and the Visitor Economy Strategy (VES) identifies the priorities for the growth of the visitor economy in the region over the next 5 years, which includes the headline target of 5% annual growth in the value of the region's tourism industry.

The Regional Visitor Survey – a Yorkshire first

In order to develop the visitor economy it is essential to have baseline information about its value and volume, the profile of visitors, how they make decisions to visit and their perceptions of Yorkshire.

Yorkshire Forward, Welcome to Yorkshire and the six Area Tourism Partnerships commissioned QA Research and The Tourism Network Ltd to conduct a comprehensive Regional Visitor Survey (RVS). The survey focuses on leisure visitors. It is scheduled to take place over three years so the resulting data will be particularly robust.

The fieldwork takes place on a quarterly cycle. Between May 2008 and April 2009 10,752 quantitative surveys were completed with visitors to Yorkshire. A representative sample was captured according to the value of tourism in each area and district. In addition a 'click-through' online survey was conducted with visitors to the Yorkshire.com website and other Yorkshire related destination websites. In total 2,031 surveys were completed between July 2008 and April 2009.

The first full year's results are now available. The Yorkshire Regional Visitor Survey is the largest of its kind to be undertaken in the UK, providing Yorkshire with valuable and robust data to keep it ahead of its competitors.

Who will use the Survey results

The results of the Regional Visitor Survey will be used in a variety of ways at different levels:

- Welcome to Yorkshire will use the results to track progress across Yorkshire, and to further develop their marketing activities
- The results will help inform the activities of the Area Tourism Partnerships
- Local authorities will be able to see the areas of their destination most in need of development as part of their place-shaping role, which will also benefit local residents
- Businesses will be able to use the results as the overall context for their own marketing activities.

Practical use of these results should have a far-reaching impact within Yorkshire's visitor economy. This research provides benchmark data, against which subsequent years can be measured. For the first time, it will be possible to rigorously assess the success of marketing, product development and customer service initiatives by Welcome to Yorkshire, the Area Tourism Partnerships and local authorities.

A Regional Overview of Findings

Positive PR messages for current and potential visitors

- 96% of current visitors stated that they would recommend Yorkshire to a friend or family – potential to convert recommendations into bookings.
- 88% stated they were likely to make a repeat visit to the region.
- High satisfaction scores were achieved with our destination products. High scores (good to very good) were achieved for accommodation, shopping, eating and drinking, attractions and value for money, demonstrating Yorkshire's strong product base.
- Overall we received high scores for feeling welcome, customer service and atmosphere and value for money – which are all key messages to provide confidence for future/potential visitors.

Valuable spend data to support business planning on increasing spend by 5%

- Detailed evidence is available of where high and low spend is made within each district, which can inform business planning to maximise visitor revenue.
- Regional spend data shows high spend in food and drink, shopping and visiting attractions.
- There are opportunities to increase spend in certain visitor markets, as well as other leisure and recreation activities and with the evening economy e.g. with food and drink after 5pm in the evening entertainment. Results indicate that we need to encourage people to shop in the local area and enjoy local food.
- Our staying visitors market is economically important, with staying visitors having an average spend of £43.79 per day compared to £19.33 for day visitors. Staying visitors on average stay for 5.2 nights and their total break per trip per party is around £500.
- Overseas visitors (£54.91) and those without children (£35.36) per day were also higher spend markets. The value of an overseas trip (£872.47) was nearly double the value of a UK staying visitor trip (£497.18), with an average length of stay of 10.4 nights.
- 81% of staying visitors stated that accommodation was good to very good value for money. This supports the fact that Yorkshire offers great value for money and businesses should resist from discounting.

Visitor profile data to support future marketing and product development activity

- Yorkshire attracts a good mix of day (65%) and staying visitors (35%).
- A high proportion of families (26%) and empty nester markets (30% are 55 years and over) are attracted to the area.

- A core set of visitors are regular repeat visitors (76%), which bodes well for satisfaction levels.
- The research shows there are further opportunities to attract more groups (1%) and overseas markets (5%) to Yorkshire.
- People living within Yorkshire are an important tourism market, with 72% of our day visitor markets living within the region and around 23% of our domestic staying visitor market from within Yorkshire.
- Outside of the region key staying visitor markets come from the South East and London (15%), North West (13%), East Midlands (13%) and the North East (10%). However high spenders tend to be from North West, East Anglia, London, Scotland and the West Midlands, which fits national marketing campaigns.
- We attract a mixed short break (49%) and long break markets (51%).
- In-house Mosaic segmentation analysis shows that Yorkshire is attracting above average staying visitors in wealthier groups, such as groups C suburban comforts (21%, wealth group 2), A symbols of success (13%, wealth 1) and B happy families (13%, wealth 4). These groups tend to be older family and empty nesters groups.

Current key motivations for visiting the region can be identified

- Internet usage (12%) was the highest form of media used outside of recommendation (23%) and previous experience (56%); this was particularly high for first-time visitors (22%) and overseas visitors (24%).
- Main activities for staying visitors to the region included visiting a specific city/village/town (23%), visiting an attraction/museum (11%), visiting an historic house/site or garden (10%) and visiting friends and relatives (16%). Visiting friends and relatives was particularly high for overseas visitors (24%).
- Main activities undertaken for day visitors included visiting attractions/museums (35%), visiting a city/town/village, visiting an historic house/site or garden (13%) and visiting a festival or outdoor event (8%).

A fuller summary of the results by ATP is available to download from our website at www.welcometoyorkshire.com