This quarterly newsletter shares the latest tourism data for the Yorkshire and Humber region including:

• Visitor Numbers and Spend
• Tourism Spend
• Accommodation Occupancy and Revenue
• Visitor Attractions Admissions Trends
Welcome to our Tourism Data Report
We compile this quarterly newsletter to bring you a range of tourism data and insight for the Yorkshire and Humber region as well as England.

We have selected findings that we feel are important to highlight and will be of use to you and your business from an extensive selection of reports that are available on the Visit Britain website. If you are interested in finding out more, go to www.visitbritain.org

We will also include updates on recent Welcome to Yorkshire activity and how it has helped visitor growth and promotion in the region.
VISITOR NUMBERS AND SPEND

The table below shows the total number of trips attributed to Domestic Overnight, Tourism Day Visits and Inbound Tourism in 2018.

It shows a comparison of the Yorkshire and Humber region against the overall results for England and provides a year on year comparison with the 2017 performance for each metric.

TABLE 1: VISITOR NUMBERS AND SPEND - YORKSHIRE AND HUMBER VERSUS ENGLAND 2018 FULL YEAR

<table>
<thead>
<tr>
<th></th>
<th>Trips (2018)</th>
<th>% change on 2017</th>
<th>Spend (2018)</th>
<th>% change on 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>YORKSHIRE AND HUMBER</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domestic Overnight</td>
<td>10.479m</td>
<td>-2.04%</td>
<td>£1.744b</td>
<td>-0.06%</td>
</tr>
<tr>
<td>Tourism Day Visits</td>
<td>129.8m</td>
<td>-13%</td>
<td>£5.066b</td>
<td>+1%</td>
</tr>
<tr>
<td>Inbound Tourism</td>
<td>1.39m</td>
<td>+3.83%</td>
<td>£603.73m</td>
<td>+6.44%</td>
</tr>
<tr>
<td><strong>ENGLAND</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domestic Overnight</td>
<td>97.404m</td>
<td>-3.2%</td>
<td>£19.347b</td>
<td>+1.56%</td>
</tr>
<tr>
<td>Tourism Day Visits</td>
<td>1.431m</td>
<td>-5%</td>
<td>£53.036b</td>
<td>+4%</td>
</tr>
<tr>
<td>Inbound Tourism</td>
<td>37.9m</td>
<td>-3.34%</td>
<td>£22.8b</td>
<td>-6.66%</td>
</tr>
</tbody>
</table>

Source: Visit England, 2018

m - million  b - billion

The number of domestic overnight trips in Yorkshire and Humber were -2.04% on 2018 figures, however this a more favourable result than the -3.2% result seen across England. Spend remained roughly in line year on year.

Tourism day visits were -13% down on 2018 results but spend increased by £43 million (1%).

The inbound tourism figures show a record-breaking 1.39 million international visitors were welcomed to Yorkshire in 2018, that’s an increase of almost 4% (3.83%) on the previous year.

Yorkshire is the only region in the UK to have seen an increase in the number of visits and the spend of international visitors in 2018.
VISITOR NUMBERS AND SPEND

In Q4 of 2018, Yorkshire and Humber performed well in terms of inbound tourism displaying growth in all metrics compared to the same quarter in 2017. This is particularly impressive considering that the same quarter comparisons for England showed slight reductions in spend from £5.23 billion to £5.21 billion and in bed nights from 58.48 million to 57.19 million.

For domestic tourism, Yorkshire and Humber saw slight drops in the number of trips and bed nights compared to Q4 of 2017 but this was countered by a significant increase in expenditure from £422 million to £490 million.

### TABLE 2: VISITOR NUMBERS AND SPEND
QUARTER FOUR UPDATE - OCTOBER TO DECEMBER 2018

<table>
<thead>
<tr>
<th></th>
<th>TRIPS 2017</th>
<th>TRIPS 2018</th>
<th>SPEND 2017</th>
<th>SPEND 2018</th>
<th>BED NIGHTS 2017</th>
<th>BED NIGHTS 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inbound Tourism - England</td>
<td>8.92m</td>
<td>9.16m</td>
<td>£5.23b</td>
<td>£5.21b</td>
<td>58.48m</td>
<td>57.19m</td>
</tr>
<tr>
<td>Inbound Tourism - Yorkshire &amp; Humber</td>
<td>275,110</td>
<td>316,630</td>
<td>£131.54m</td>
<td>£159.22m</td>
<td>1.96m</td>
<td>2.34m</td>
</tr>
<tr>
<td>Domestic Tourism - England</td>
<td>25.313m</td>
<td>23.359m</td>
<td>£4,278m</td>
<td>£4,214m</td>
<td>69.346m</td>
<td>65.731m</td>
</tr>
<tr>
<td>Domestic Tourism - Yorkshire &amp; Humber</td>
<td>3.068m</td>
<td>2.859m</td>
<td>£422m</td>
<td>£490m</td>
<td>7.444m</td>
<td>7.360m</td>
</tr>
</tbody>
</table>

Source: Visit England, 2019

m - million  b - billion
These figures show that City/Large towns are the dominant destination type for the Yorkshire and Humber region - this is largely in line with the average for England. The results for Seaside/Coast appear low at 6% and fall under the national average by 2%. Interestingly the number of visits for Village/Countryside for Yorkshire and Humber are considerably higher than England, +9%. This could be attributed to there being three National Parks (two full and one part) and two AONBs in the region, and the visitor appeal they have.
TOURISM SPEND

Both Yorkshire and Humber and the North East region have increased total tourism spend, with the Yorkshire and Humber increasing by 2%. This is against slight decreases in total tourist spending in the North West and England overall.

FIGURE 2: TOURISM SPEND CHANGES 2018 VERSUS 2017

Source: Visit Britain, 2018
TABLE 3: YORKSHIRE AND HUMBER OCCUPANCY AND REVENUE JANUARY - JUNE 2019 VERSUS 2018

<table>
<thead>
<tr>
<th>MONTH</th>
<th>ROOM OCC (19)</th>
<th>ROOM OCC (18)</th>
<th>BEDSPACE OCC (19)</th>
<th>BEDSPACE OCC (18)</th>
<th>ADR (19)</th>
<th>ADR (18)</th>
<th>RevPAR (19)</th>
<th>RevPAR (18)</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>60%</td>
<td>61%</td>
<td>43%</td>
<td>43%</td>
<td>£56.31</td>
<td>£57.00</td>
<td>£33.89</td>
<td>£34.69</td>
</tr>
<tr>
<td>February</td>
<td>74%</td>
<td>71%</td>
<td>53%</td>
<td>50%</td>
<td>£58.76</td>
<td>£59.91</td>
<td>£42.03</td>
<td>£42.29</td>
</tr>
<tr>
<td>March</td>
<td>72%</td>
<td>69%</td>
<td>51%</td>
<td>50%</td>
<td>£60.10</td>
<td>£61.02</td>
<td>£43.23</td>
<td>£42.25</td>
</tr>
<tr>
<td>April</td>
<td>75%</td>
<td>74%</td>
<td>55%</td>
<td>53%</td>
<td>£61.79</td>
<td>£61.90</td>
<td>£46.38</td>
<td>£45.53</td>
</tr>
<tr>
<td>May</td>
<td>76%</td>
<td>75%</td>
<td>55%</td>
<td>54%</td>
<td>£64.75</td>
<td>£65.03</td>
<td>£49.19</td>
<td>£48.61</td>
</tr>
<tr>
<td>June</td>
<td>79%</td>
<td>78%</td>
<td>56%</td>
<td>56%</td>
<td>£66.89</td>
<td>£65.90</td>
<td>£52.84</td>
<td>£51.29</td>
</tr>
</tbody>
</table>

Source: Visit Britain, Accommodation Occupancy 2019

Yorkshire and Humber have increased RevPAR** across the last quarter (April-June) compared to the same period last year. It appears that this has mainly been driven through increased room occupancy rather than ADR* which, with the exception of June, has shown a very small drop year-on-year. Due to Easter and the warm weather over the holiday period it seems that April 2019 has improved on March 2019 performance.

Key terms:

*Average Daily Rate (ADR) - This is the average rate paid for rooms sold. It is calculated by dividing room revenue by rooms sold, i.e. ADR = Room Revenue / Rooms Sold.

**Revenue per Available Room (RevPAR) - This is the revenue generated from the sale of actual rooms. RevPAR can be calculated by using one of the following formulas - total revenue from guest rooms / total number of available rooms or Occupancy x ADR.
ACCOMMODATION OCCUPANCY AND REVENUE

In 2018, room occupancy was highest in the months of July and September. This is the same as experienced in 2017.

There has been growth in room occupancy in all months except July (decreased by 2% points in 2018), August and October (remained static), and September (decreased by 1% point in 2018).

ADR and RevPAR were also the highest in the months of July and September 2018. This is the same pattern as 2017 where comparative ADR and RevPAR data is available.

TABLE 3A: YORKSHIRE AND HUMBER OCCUPANCY AND REVENUE JANUARY - DECEMBER 2018 VERSUS 2017

<table>
<thead>
<tr>
<th>MONTH</th>
<th>ROOM OCC (18)</th>
<th>ROOM OCC (17)</th>
<th>BEDSPACE OCC (18)</th>
<th>BEDSPACE OCC (17)</th>
<th>ADR (18)</th>
<th>ADR (17)</th>
<th>RevPAR (18)</th>
<th>RevPAR (17)</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>61% 53%</td>
<td>43% 37%</td>
<td>£57.00</td>
<td>£34.69</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>February</td>
<td>71% 63%</td>
<td>50% 46%</td>
<td>£59.91</td>
<td>£42.29</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>March</td>
<td>69% 64%</td>
<td>50% 46%</td>
<td>£61.02</td>
<td>£45.53</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>April</td>
<td>74% 68%</td>
<td>53% 53%</td>
<td>£61.90</td>
<td>£42.25</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>May</td>
<td>75% 70%</td>
<td>54% 52%</td>
<td>£64.93</td>
<td>£48.86</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>June</td>
<td>78% 77%</td>
<td>56% 55%</td>
<td>£65.85</td>
<td>£51.52</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>July</td>
<td>80% 82%</td>
<td>57% 59%</td>
<td>£66.64</td>
<td>£53.37</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>August</td>
<td>79% 79%</td>
<td>59% 59%</td>
<td>£66.51</td>
<td>£54.31</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>September</td>
<td>80% 81%</td>
<td>57% 56%</td>
<td>£66.27</td>
<td>£53.26</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>October</td>
<td>78% 78%</td>
<td>55% 55%</td>
<td>£66.95</td>
<td>£50.75</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>November</td>
<td>77% 76%</td>
<td>55% 53%</td>
<td>£64.31</td>
<td>£50.68</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>December</td>
<td>69% 68%</td>
<td>50% 51%</td>
<td>£63.73</td>
<td>£43.98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Visit Britain, Accommodation Occupancy archive 2018
VISITOR ATTRACTIONS ADMISSIONS GROWTH

Yorkshire and Humber showed the second highest level of regional visitor growth at attractions in 2018 as seen in Figure 3, with a 7% increase in total visitor admissions on 2017 figures.

The North West saw a growth of +8% in 2018. This could be attributed to interest in large attractions such as The World Museum Liverpool, with its successful and much publicised Terracotta Warriors exhibition.

The Yorkshire and Humber result compares favourably against an average increase of 2% across all regions in 2018.

**FIGURE 3: VISITOR ATTRACTION ADMISSION GROWTH TRENDS - 2018 VERSUS 2017**

VISITOR ATTRACTIONS REVENUE GROWTH

Yorkshire and Humber showed a 2% gain in revenue from visitor attractions in 2017 as can be seen in Figure 4. This may have been driven by a 4% growth in adult admission charges to an average 2018 charge of £7.78 (Visit England, 2019).

Most regions in England saw positive increases in revenue, with the exception of the Midlands and London, with the average gain being 2%. The highest revenue gains were in the North West and the East.

FIGURE 4: GROSS VISITOR ADMISSIONS REVENUE GROWTH TRENDS 2018 VERSUS 2017

SPOTLIGHT ON THE TOURISM SECTOR DEAL

In June 2019 the new Tourism Sector Deal was announced as part of the UK Government’s Modern Industrial Strategy. Tourism has now joined other sectors such as aerospace, construction and the creative industries to get a sector deal. It sets out ambitious targets to more than double the value of the UK tourism industry to £268 billion, add a further 1.8 million visits and deliver a 1% increase in productivity, worth £12 billion, all by 2025. The strategy is designed around five key pillars covering place, infrastructure, people, ideas and business environment but what does this mean for the Yorkshire and Humber region?

Here are the key things to look out for...

PLACE

There will be up to 5 Tourism Zones supported by central government and a biddable funding process co-ordinated by VisitBritain. Applications will open in December 2019 and successful Tourism Zones will be announced in March 2020. The focus of Tourism Zones will be to co-ordinate businesses and local organisations to create strategies that centre on local visitor economy growth with a specific focus on increasing off-season visits. SME’s in Tourism Zones will receive targeted digital skills training via the “Be the Business Programme”.

INFRASTRUCTURE

The deal sets out a plan to develop an additional 130,000 bedrooms by 2025, new attractions and innovative tourism products. The good news for Yorkshire and Humber is that 75% of these additional rooms will be outside the capital. There will also be a focus on improving the accessibility of tourism products and services with a target to increase the number of international visitors with disabilities to the UK by 33%.

PEOPLE

The sector deal includes a £1 million recruitment and retention programme to be led by the newly formed Hospitality and Tourism Skills Board. This will aim to create an additional 10,000 apprenticeship starts per year by 2025 and a mentoring scheme to cover 10,000 employees to help them develop careers in the sector. There will also be two new T Level courses in Catering and Cultural Heritage and Visitor Attractions. T Levels are new 2-year courses equivalent to three A Levels that combine classroom learning with “on-the-job” experience to increase the future employment readiness of students.

IDEAS

Here the sector deal focuses on the introduction of a Tourism Data Hub that will be designed to help organisations and SME’s to leverage the power of big data to help them better understand visitor activity and product preferences. It will tap into data inputted from Online Travel Agents (OTAs), booking platforms and banking/credit card companies that will provide a central database of consumer behaviour data that could be used to support strategic planning and marketing initiatives.

BUSINESS ENVIRONMENT

The sector deal has a major focus on increasing the value of business tourism to support the agenda of increasing off-season visitors. To help achieve this an International Business Events Action Plan 2019-2025 has been devised. In addition the Great Britain Tourism Exchange has been set-up. This is a business-to-business platform that connects tourism suppliers to global distributors with the aim of enabling them to promote their products internationally and offers distributors real-time access to a wider range of accommodation, tours, attractions, events and transport options.

If you would like to see the full Tourism Sector Deal report, it can be found at www.gov.uk/government/publications/tourism-sector-deal
THE ECONOMIC IMPACT OF THE 5TH EDITION OF THE TOUR DE YORKSHIRE

The 2019 Tour de Yorkshire and Asda Tour de Yorkshire Women’s Race were viewed across the globe by a record-breaking audience of 28 million – an increase of 124% on the fourth edition viewing figures of 12.5 million in 2018.

Research undertaken by independent research company GRASP and compiled by Leeds Beckett University show that the overall income from the event boosted the county’s economy by £60 million.

The infographic on the next page highlights the key facts and achievements of this year’s race.

To view a full copy of the Economic Impact Assessment go to: www.letour.yorkshire.com/information/economic-impact/

Source: GRASP/Leeds Beckett University, 2019
THE RACE

1.9M
1.9 MILLION SPECTATORS ALONG THE ROUTE

885.5KM
THE TOTAL DISTANCE OF THE ROUTE WAS 885.5 KM

150
THE RACE PASSED THROUGH 150 CITIES, TOWNS AND VILLAGES

3,979
3,979 CYCLISTS TOOK PART IN THE MASERATI TDY RIDE

272
272 MEMBERS OF THE WORLD’S MEDIA OVER FOUR DAYS

27
THERE WERE 27 VEHICLES IN THE 2019 PUBLICITY CARAVAN

£60M
ECONOMIC IMPACT OF THE TOUR DE YORKSHIRE 2019

20%
20% OF SPECTATORS FROM OUTSIDE YORKSHIRE AND ABROAD

5TH EDITION 2 - 5 MAY 2019 KEY FACTS

DIGITAL IMPACT

91.2M
91.2 MILLION DIGITAL REACH ON SOCIAL MEDIA

279K
279,000 FANS ON SOCIAL MEDIA

2.7M
WEBSITE PAGE VIEWS IN 167 COUNTRIES

1.44M
ONLINE FILM VIEWS, 1.44 MILLION - A 30.9% INCREASE

INTERNATIONAL COVERAGE

28M
28M CUMULATIVE TV AUDIENCE — UP 124% ON 2018

12.9%
PRESS ARTICLES FEATURING THE RACE UP 12.9% YEAR-ON-YEAR (SOURCE: KANTAR)

190
BROADCAST TERRITORIES

39
BROADCASTERS OF LIVE COVERAGE AND HIGHLIGHTS

AUDIENCES

46 HOURS
46 HOURS OF LIVE AND REPEAT BROADCAST ON EUROSPORT

800K
AUDIENCE PEAK ON DAY 4 HALIFAX TO LEEDS

COMMUNITY

75,000
OPPORTUNITIES FOR PEOPLE TO BORROW A BIKE WITH YORKSHIRE BANK BIKE LIBRARIES

1,500
1,500 VOLUNTEERS OVER FOUR DAYS

PODIUMS

Chris LAWLESS
Great Britain

Marianne VOS
Netherlands

Chris LAWLESS
Great Britain

Christine MAJERUS
Luxembourg

Arnaud COURTEILLE
France

Mavi GARCIA
Spain

Sources: A.S.O. Media Department, Welcome to Yorkshire, Eurosport, ITV.
THE IMPACT OF THE YORKSHIRE GARDEN AT THE 2019 RHS CHELSEA FLOWER SHOW

This was another award winning year for Welcome to Yorkshire at the RHS Chelsea Flower Show, with a garden inspired by the county’s proud history of industry, manufacturing and innovation, as well as its stunning natural environment. The finished garden was reminiscent of the urban regeneration that has taken place along many of Yorkshire’s canals and consisted of a towpath and canal lock gates, a perennial meadow, a vegetable patch and a lock keepers’ cottage. It won both a gold medal and the coveted BBC People’s Choice 2019.

The following infographic highlights what our presence at this renowned event has generated in terms of positive exposure and media coverage for the region – both to national and international audiences.
The Welcome to Yorkshire Garden 2019 was our tenth and most successful garden at RHS Chelsea Flower Show winning a Gold Medal and the BBC People's Choice Award 2019.

#### Yorkshire at Chelsea.

**The Chelsea experience**

- **168,000**
  
  Around 168,000 visitors come to the show each year.

- **35,000**
  
  35,000 copies of 2019 Gardens Guide distributed at the show.

- **19 days**
  
  Show Gardens are built from scratch in just 19 days and will be dismantled in only 5 days.

- **38**
  
  Our garden recieved 38 minutes of national TV coverage.

- **3,010**
  
  Average number of plants used in each Show Garden.

#### 2019 key statistics

- **2.2m**
  
  Organic digital reach of 2,265,330.

- **131,296**
  
  131,296 views of the 2019 garden build timelapse film.

- **8**
  
  2019 is the eighth time we have won the BBC People's Choice Award.

- **174.5m**
  
  Total media reach of 174,620,474 with an EVE of £11,295,296.

- **639**
  
  639 pieces of broadcast, print and online coverage.
For further information:
Contact
T 0114 225 2095
E d.j.egan@shu.ac.uk

Go to
www.visitbritain.org
to explore a wide range of tourism insight reports.