

# Middleton Lodge: Comparative / Commentary Note

01/02/07

Three arguments are considered:

1. The size and impact of the scheme
2. The question of competition and displacement
3. Benefits to the area

## 1. Size and impact of the scheme

Table 6.3 contains the visitor attraction element projected visitor numbers. Two segments are noted – Local residents, 33,448<sup>1</sup>, and tourist 44,850, making a total of 78,298.

The **local residents** projected figure is probably realistic in the early life of the product but without product refreshment / development the repeatability factor would not be maintained. Based on other attractions the most cost effective “refreshment” would be an events activity programme. This would bring in numbers of visitors at specific times with attendant visitor management of parking and traffic problems. As an example a low-key programme could attract some 2,000 visitors to its events programme<sup>2</sup>. (A 2,000 figure has been included in the projections).

An **events** activity programme could “cover” any shortfall in the stated EIA repeatability factors and also add an additional 2,000 to the overall visitor numbers.

Re the **tourist** figures. The 2004 all England visit to gardens percentage is 6.4<sup>3</sup>. (Disaggregated 2005 Yorkshire propensity to visit gardens and North East figures are not available). A penetration factor of 5% (the same as in the EIA report) has then been used both for overnight visitors and for day-trippers.

Para 6.7 states that “Yorkshire attracts 87 Million day trips of which approximately 32 Million visit North Yorkshire. If 6% of these visit gardens then this results in a potential market of 522,000 day visitors with a propensity to visit the garden attraction” [The calculation appears wrong however, in that 6% of the 87 million stated as visiting Yorkshire is actually 5,220,000; 6% of the 32 million stated as visiting North Yorkshire is 1,920,000 not the 522,000 stated in

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<sup>1</sup> This encompasses repeatability factors of 4 and 2.

<sup>2</sup> Stewart Park, Middlesbrough attracts 2k from events via a very low key internal, largely learning, programme, a similar number to the Moors Centre at Danby; Ladycross Quarry Nature Reserve nr Slaley in Northumberland is projected to attract between 2150 and 8500 event and special interest visitors p.a. and Kirkley Hall, an estate in Northumberland, from 2280 to 9120 event visitors pa.

<sup>3</sup> [www.tourismtrade.org.uk](http://www.tourismtrade.org.uk)

the report. 5% of this figure – the referenced penetration factor - would therefore be 96,000 not 26,100.]

The tourist figures however also do not include overnights in the North East – these have been missed out (a major omission). With the inclusion of Durham and Tees Valley tourist overnights and including the VFR audience, there is a total of 3,807,700 and using the England visit to gardens propensity factor of 6.4% there would be potentially a visitor market of 243,692.8. Using the EIA Reports 5% penetration factor this would result in 12,184.6 visitors to the garden.

The day-trip market noted as being “day tripper from outwith a 30 min drive time” and stated as being a potential market of 522,000 (para 6.7) with a penetration factor of 5% also appears to exclude the North East. Using the England visit propensity to gardens figure of 6.4% and a day visitor market of 29,799,800 (Tees valley and Co. Durham) there would be an additional 95,359.4 day visitors using the Report’s stated penetration factor of 5%.

The stated education figure of 3,000 however appears realistic given competing attractions / venues for such visits.

The new table would therefore be as follows:

<b>Table 6.3 Middleton Lodge: Throughput Data – Visitor Attraction</b>					
Market Segment		Potential Mkt Size	Penetration <sup>4</sup>	Repeatability	Throughput
<b>Local Residents</b>					
0 – 20 minutes drive	Visit natural interest sites	28,029	10%	4	11,211
	Visit beauty spots	38,265	10%	4	15,306
21 – 30 minutes drive	Visit natural interest sites	29,329	5%	2	2,933
	Visit beauty spots	39,972	5%	2	3,997
					33,448
<b>Tourists</b>					
Overnight in North Yorkshire	Visiting Gardens	315,000	5%	1	15,750
<b>Overnights Co Durham &amp; Tees Valley</b>					<b>12,185</b>
Day-tripper from outwith 30-min drive time	Visiting Gardens	522,000	5%	1	(26,100)
<b>Day trip NE</b>					<b>Revised 96,000</b>
<b>Education</b>					<b>95,359</b>
<b>Events</b>					<b>3,000</b>
<b>Total</b>					<b>2,000</b>
<b>New Total</b>					<b>78,208</b>
					<b>257,715</b>

<sup>4</sup> No evidence is provided as to penetration values or for repeatability.

The new total then becomes more in line with other country house + garden enterprises and would position the development as a major regional level attraction. (No allowances have been made for the references to “enhanced experiences” e.g. the mazes, play area<sup>5</sup> etc).

**Conferences** – the forecast 120 events pa appears realistic. However, cognisance must be paid to the competition / displacement question.

**Restaurant** – It is not entirely clear as to the positioning of the restaurant nor its envisaged trading pattern. It appears as an up market proposition and also one that is open at lunch times as well as evenings. One presumes that the restaurant would also encompass the conference / function market requirements.

A total of 18,655 couverts are projected which is possible based on the calculations made in the report. It is however noted that the restaurant would also “act” as the café. This is not entirely compatible given that it is also stated that the café would be for the visitor attraction and “meeting place for the local market”. There is also the question of competition and displacement.

**Café** – An additional through put of use of the restaurant as a café facility is estimated at 25,093 broken down as 15,581 from tourists and 9,512 from the residents market. Number of residents visits p.a. can be argued with, ranging as it does from one p.a. to six visits p.a. but given the potential catchment could be achievable. The new total visitor figures of 257,715 would result in a new figure of 51,543 using the EIA report’s 20% penetration factor.

**Estate Shop** – The report notes a figure of 8,572 of which 7,791 would come from the tourist visitor (a 10% penetration factor is quoted). With the new tourist figures (and the local trade remaining the same) the shop could have some 25,774 visitors<sup>6</sup>. Customers, even from the tourist audience, could well call only for the shop thereby increasing traffic movements and the need for short stay parking.

There is also the question of competition and displacement.

**Accommodation** – 30 letting weeks per unit are forecast. Given the proposed additional use for functions and weddings this figure is considered as reasonable.

**Summary** – The EIA calculations are both inaccurate and omit North East tourist figures. Reworking of the figures produce significant numbers of potential visitors that would result in Middleton becoming a major visitor attraction. As such it will be a major generator of visitors and of traffic movements<sup>7</sup>. The issue becomes one of the scale and positioning of the quarry garden attraction within the visitor mix.

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<sup>5</sup> As distinct from a Digger World.

<sup>6</sup> The new total of 257,715 and an EIA 10% penetration.

<sup>7</sup> The proposed indicative car parking provision would also need to be addressed.

## 2. The Question of Competition and Displacement

### Visitor Numbers

The following table updates where possible the visitor numbers stated in the EIA Chapter.

#### Garden attraction<sup>8</sup> – Visitor numbers

Attraction	EIA Figures (2004)	2005
Carlisle Park, Morpeth	190,000 E <sup>9</sup>	224,000
RHS Garden Harlow Carr, Harrogate	96,000 <sup>10</sup>	179,228
Helmsley Walled Garden, Helmsley	38,000	25,000
Sutton Park, York	6,000	-
Parcevall Hall gardens, Nr Skipton	7,000	-
Hardwick Park, Sedgfield	230,000	230,000
Hamsterley Forest, Wear Valley	144,567	158,045*
Eggleston Hall Garden, Teesdale	20,000	20,000*
Crook Hall Gardens, Durham City	7,000	8,000 E (2006) <sup>11</sup>
Raby Castle Park and Gardens, Co. Durham	28,000	23,500
Alnwick Garden	435,000 <sup>12</sup>	555,470

\* 2002 were the most recent figures available

The adult entry cost for the Alnwick Garden is £7 (<http://www.alnwickgarden.com>, 2007).

There is reference to the Alnwick Garden but it should also be noted that the fountains, garden planning, café and tree house complex cost an estimated £42m. The Garden is also run not by a private company but by the Alnwick Garden Trust (in reference to community interest and fundability).

According to Yorkshire Tourist Board's Market Intelligence Unit Survey of Visits to Visitor Attractions (2004) List of Gardens and Historic Houses / Properties as a visit category, 31 are listed. Based on the original EIA figure of 80,000 visitors per annum, Middleton would be 11<sup>th</sup> ranked in this category.

<sup>8</sup> The choice of "comparators" in the EIA is an unusual mix. Some are simply not comparable either in type or size.

<sup>9</sup> According to One North East's Market Intelligence Unit this statistic 190,000 was in 2002.

<sup>10</sup> According to Visit Britain's Visitor Attractions Survey the statistic for 2004 was 149,918.

<sup>11</sup> An estimated figure of 8,000 visitors in 2006 (Research undertaken at Crook Hall).

<sup>12</sup> According to Visit Britain's Visitor Attraction Survey the statistic for 2004 was 380,000.

**Restaurant** – There are estimated 30 rural based restaurants<sup>13</sup> within a 6km radius of the site. They average 25 – 30 couverts with the majority offering “traditional” British cuisine. Given the nature of the proposed Middleton offer and as the eating out market expands Middleton is not seen as a major competitor to these other facilities.

### **Conferences / meeting rooms**

(It is assumed that such existing venues would also host weddings).

Approximately 32 venues have been identified in the North Yorkshire and Darlington areas<sup>14</sup>. These comprise an estimated total of 120 meeting rooms. More facilities are being developed e.g. the Morton Park Business Training centre in Darlington. (The comparative examples prepared for the Initial Report remain valid).

Contact has been made with Seager Associates 22/01/07 (in response to the EIA report reference to Tailor Made Conferences). The response (Seager Associates nr Ripon) is that there is a shortage but only of the larger venues. Angela Seager doubted that a new venue in the area would attract the, to be targeted, business clientele given its location and lack of associated accommodation. (The proposition is also not to provide large-scale facilities as the largest room proposed for Middleton is only of a 50 capacity).

**Estate Shop** – Competition will relate to the offer provided. There is reference to Estate food sourcing and indeed the future possibility of on-line sales. An Estate brand is mentioned – an increasingly common development. Crafts and souvenirs are also presumed to be part of this offer. There is also the issue of liquor licensing and retail sales, which is not referenced in the EIA.

The size of the Estate will however probably preclude volume sales and the planning question becomes one of sourcing<sup>15</sup> – the Farm Retail Association for example suggests as an estate model 40% local, 40% regional and 20% elsewhere.

Middelton Tyas, with a population of 700 (half retired) has a village shop in the Memorial Hall offering groceries, local produce, deli, off license, fresh sandwiches, ice cream, bread and newsprint. Barton, with a population of 884 has a village store offering grocers, confectionary, groceries and newsprint. Both shops also offer PO services<sup>16</sup>. In Barton there is also a separate family butcher. All three shops would, for at least part of their offer, directly compete with the Estate shop.

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<sup>13</sup> This includes a number of inns.

<sup>14</sup> Preliminary appraisal sent to JE 30/3/06 and updated to include the Darlington area.

<sup>15</sup> Locality sourcing definitions vary e.g. 30 – 50 miles.

<sup>16</sup> The national pressure on rural POs should be noted together with the importance of having a broad rural shop offer.

In addition here is also Scotch Corner “motorway” type services of Moto (Little Chef, Burger King, shop and coffee shop). The adjacent garage also sells convenience goods and is a snack shop. Off the Barton junction there is also the Barton Quarry Services that at the moment caters for heavy good vehicle type trade. Under the signage proposals all Lodge traffic will however be signed past Scotch Corner services and the Barton Quarry Services.

The Estate shop will have a specific effect on the three local shop ventures given what is proposed retail offer, and also not least because of the proposed traffic signage away from both Middleton Tyas and Barton villages.

**Summary** – There will undoubtedly be competition and displacement e.g. to other conference / meeting / wedding venues in the locality and because of the Estate shop element.

### **3. Benefits to the Area<sup>17</sup>**

**Community engagement** is not referenced either in terms of locality sourcing (e.g. of local crafts) or in terms of how the communities can be benefit – the connectivity (the one exception is the time limited free entry to the attraction).

**The development proposals.** The restoration of the stable block and walled garden will certainly be beneficial in terms of the heritage resource, however it is stated the “The redevelopment of the stable block involves significant expenditure however these restoration works would provide spaces that could have alternative uses should the venture prove unsuccessful”. This perhaps indicates uncertainty and raises questions of the final use. The estate will naturally have a property and rental asset.

**Potential Income.** Para 6.14 makes reference to future business planning process and as a recommendation that “Notwithstanding the analysis does show that some [?] potential exists and that a well a managed well marketed operation at Middleton Lodge could create a sustainable business which supports the continuation of this important Estate”. It appears that much work still needs to be done on working up the figures but also on how the product and visitor mix work together and is managed and marketed.

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<sup>17</sup> In the Scoping Opinion from NYCC there is reference to “alternative methods of financing the work to the historic buildings other than via mineral extraction” – this is not addressed in the EIA – “the need for development dimension”.

**EIA Report -Table 6.7 Potential income as revised using the new figures:**

<b>Table 6.7 – Trading Forecast</b>			
<b>Element</b>	<b>Throughput (rounded)</b>	<b>Average Charge / Spend</b>	<b>Income (rounded)</b>
Visitor Attraction	80,000 (257,715)	£2.00 (adult only – child free)	£80,000 <sup>18</sup> (£257,715)
<b>Events</b>	<b>2,000</b>	<b>£5</b>	<b>(£10,000)</b>
Café	25,100 (51,543)	£3.50	£88,000 (£180,401)
Shop	8,500 (25,774)	£4.00	£34,000 (£103,096)
Cottages	120 weeks (60 weeks)	£400 per week	£48,000 (£24,000)
Weddings, inc. food & beverage	28 exclusive hires	Average of £10,000 per exclusive hire	£280,000
Weddings, inc. food & beverage	20 day hires (no accommodation)	Average of £6,000 per day	£120,000
Conferences	120 hires including 18 residential (120)	Including catering	£250,000 (Est £224,000)
Restaurant	18,500 couverts	Average spend £20 per couverts	£375,000
Total			£1,275,000
<b>New Total</b>			<b>(£1,574,212)</b>

It is assumed, though not stated, that the above table refers to gross income.

**Weddings** – whilst the overall number of weddings is realistic the number of exclusive hires (28) is optimistic given that exclusivity could only be really secured out of season and that the Estate has no overnight accommodation (apart from the two holiday cottages). The EIA potential income figure has however not been changed.

**Conferences** – Whilst the 120 seems achievable the 18 residential does not given the absence of any associated accommodation.

For the **accommodation** a figure of 120 weeks is noted, yet in the report it is stated that the 2 units each have a 30-week occupancy. (The EIA figure is miscalculated).

There is no reference to **events** income<sup>19</sup>.

<sup>18</sup> Assumes the 50% concession.

<sup>19</sup> The Moors Centre at Danby income from events 2003-4 was almost £10,500.

**Multiplier Effect.** In terms of overall impact a figure of £1.5m is estimated to produce 50FTE. There are no details of the calculations<sup>20</sup> or whether the employment is gross or net additional. To arrive at a figure will require outline development costs. (From other work for this amount of off-site expenditure a figure of 50 Gross FTE could be anticipated). The normal calculation would also include a displacement factor. From other work in both Yorkshire and the North East regions a 10% displacement factor is normally assumed.

Tourism UK has referenced the future use of the Yorkshire Tourist Board's PRIME model<sup>21</sup> to calculate the impacts. Such an assessment is normally undertaken once a product "mix" is frozen.

**Summary –** The potential impacts, given the revised figures, would be more significant than outlined in the EIA. There is also a lack of clarity over both the generic impacts and the impacts at a local level e.g. jobs will be created but where will the staff come from for the unspecified jobs outlined.

In principle the stable block redevelopment represents a logical heritage re-use of the buildings but the café and shop elements are entirely related to the visitor attraction. Without the attraction the economic sustainability of these two elements must be questioned.

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<sup>20</sup> Green Book or otherwise.

<sup>21</sup> This is a model prepared by Geoff Broom for specific projects in which certain variables such as employment, construction, attractiveness and spend are input from which the outputs include volume and value and jobs. The YTB (Mark McGill 0904 773331) charge £2.5k for this work.

## For information only: General Background Tourist Information and Future Trends in Leisure and Tourism

### Main activities on tourism visits by destination

Main Activity	Visits to:			
	All Visits %	Town / city %	Countryside %	Seaside / Coast %
To eat / drink out	25	26	24	16
Visit friends / relatives at their home	16	17	15	14
To go shopping (not food & not regular)	16	20	5	5
For entertainment (e.g. cinema, theatre, club)	11	14	3	3
Visit leisure attraction, place of interest, special event / exhibition	10	8	18	8
Hobby or special interest	5	4	6	4
Watching live sport or attending live event (not TV)	3	3	2	2
Walk, hill-walk, ramble	3	1	8	4
Drive, sightsee, picnic, pleasure boating	3	2	5	10
Visit beach, sunbathe, paddle in sea	2	*	*	24
Take part in sports or active pursuits indoor, outdoor, field, water	2	1	4	2
Visit park or garden	2	2	6	1
To take part in informal sports, games, relaxation and wellbeing	1	1	2	1
Cycling, mountain biking	*	*	1	2
Swimming	*	*	-	1

Source: GB Leisure Day Visits 2004 (Report of the 2002-03 Great Britain Day Visits Survey)

Note: \* less than 1%

### Distance Travelled and Time Spent

In 2002/3, tourism day visits involved an average round trip of around 35 miles, much longer than the average trip length of day visits generally (15-16 miles). This varied considerably by destination: the longest distances were on seaside trips (62 miles) whilst the shortest distances were for town / city tourism day-trips (30 miles). The average for countryside was 41 miles.

In 2002/3, trips lasted an average of 5 ½ hours in total, with an average of just over 3 ½ hours spent at the destination. Seaside tourism day trips were longer than trips to other destinations, lasting for around 6 ½ hours on average.

### When tourism day visits were made

Tourism day visits were an all-year-round activity with little difference in the overall volumes between summer and winter. That said, tourism day-trips to towns / cities were rather more likely in the December – March period than during the summer. Conversely, tourism day trips to the seaside / coast and countryside were more common in the June – August period.

**According to the UK Tourism Survey 17% of all trips to tourist attractions take place in Aug.**

[For the attraction element and, based on other project work 50% of visits are made at the weekend; 30% also arrive in the first hour. What is important is the duration of stay. Staff trips are in the hour before opening and the hour after closing with seasonal variations. Travel trade, clubs/groups and associations, are an important element of attraction visits perhaps 5 –10% - a coach occupancy of 20 could be assumed].

**Government Office Regions as ORIGINS of leisure day visits (2002-3)**

	North East	North West	Yorks / Hum	West Midlands	East Midlands	East of England	London	South East	South West
<b>All Trips</b>	254m	699m	523m	454m	333m	499m	628m	765m	377m
Town / city	186m	459m	376m	359m	228m	320m	580m	511m	186m
Seaside / coast	24m	24m	17m	1m	3m	28m	4m	50m	50m
Countryside	44m	216m	131m	94m	102m	150m	43m	204m	141m
Av. £ per trip	£10.00	£13.30	£13.50	£10.00	£14.60	£13.60	£14.20	£16.10	£13.70
Total Expenditure	£2.53bn	£9.32bn	£7.09bn	£4.90bn	£4.85bn	£6.77bn	£8.94bn	£12.30bn	£5.18bn
Av. trip duration (hrs)	3.3	3.2	3.2	3.3	3.3	3.2	3.2	3.5	3.3
Av. Time at dest. (Hrs)	2.4	2.3	2.3	2.5	2.4	2.3	2.3	2.5	2.4
Av. Distance (miles)	16.4	14.5	13.6	17.7	17.7	15.6	10.2	15.7	17.6

**Government Office Regions as DESTINATIONS of leisure day visits**

	North East	North West	Yorks / Hum	West Midlands	East Midlands	East of England	London	South East	South West
<b>All Trips</b>	227m	662m	465m	467m	348m	488m	580m	809m	324m
Town / city	171m	445m	332m	353m	228m	321m	559m	510m	165m
Seaside / coast	22m	23m	8m	0m	12m	30m	0m	53m	48m
Countryside	35m	194m	125m	114m	108m	137m	21m	246m	111m
Av. £ per trip	£9.80	£15.20	£11.20	£11.70	£14.30	£14.40	£13.30	£16.60	£13.10
Total Expenditure	£2.23bn	£10.08bn	£5.19bn	£5.48bn	£4.96bn	£7.05bn	£7.74bn	£13.45bn	£4.24
Av. Trip duration (hrs)	3.1	3.2	3.2	3.4	3.5	3.3	3.3	3.4	3.2
Av. Time at dest. (Hrs)	2.3	2.3	2.3	2.5	2.6	2.4	2.3	2.4	2.4
Av. Distance (miles)	11.4	13.6	16.3	17.8	16.1	15.5	11.7	15.4	16.6

## Overseas Tourism in Yorkshire and North East Regions

Source: [www.tourismtrade.org.uk](http://www.tourismtrade.org.uk)

### Overseas Tourism in the Yorkshire Region 2005

	Staying Visitors		Nights (Millions)		Spend	
	000s	%	Millions	%	£ Million	%
<b>Yorkshire</b>	1,130	3.8	8.5	3.4	387	2.7
Hull UA	60	0.2	0.7	0.3	20	0.1
North Yorkshire	410	1.4	2.3	0.9	103	0.7
South Yorkshire	240	0.8	1.7	0.7	61	0.4
East Yorkshire	20	0.1	0.2	0.1	5	0.0
West Yorkshire	390	1.3	3.4	1.4	188	1.3
North Lincolnshire	30	0.1	0.4	0.2	10	0.1

### Overseas Tourism in the North East Region 2005

	Staying Visitors		Nights (Millions)		Spend	
	000s	%	Millions	%	£ Million	%
<b>North East</b>	590	2.0	5.1	2.0	206	1.5
Tees Valley / Cleveland	50	0.2	0.6	0.2	22	0.2
Durham	120	0.4	1.2	0.5	43	0.3
Northumberland	60	0.2	0.3	0.1	14	0.1
Tyne & Wear	380	1.3	3.0	1.2	127	0.9

## UKTS 2004 – North East – Trends

Source: [www.staruk.org](http://www.staruk.org)

### Volume and spending of Tourists in the North East 2004

UK Residents	Trips		Nights		Spend	
	Millions		Millions		£ Millions	
North East	3.8		10.4		700	
Northumberland	0.8		2.7		119	
Durham	0.6		1.1		71	
Tyne & Wear	2.0		4.9		411	
Tees Valley	0.5		1.8		99	
England	101.4		214.0		18,960	

Source: United Kingdom Tourism Survey (UKTS)

## Purpose of Trip to the North East (Volume and Spending) 2004

UK Residents	Trips	Spend
	Millions	£ Millions
Holiday, Pleasure / Leisure	1.3	272
Visiting Friends and Relatives mainly as a holiday	0.6	89
Visiting Friends and Relatives	1.0	110
Business	0.6	166
Other	0.3	64
All Purposes	3.8	700

Source: United Kingdom Tourism Survey (UKTS)

## Average Expenditure in the North East 2004

	UK Residents
Average per trip	£180
Average Spend per Night	£66

Source: United Kingdom Tourism Survey (UKTS)

## Tourism Spend by Category in the North East 2004

	£ Millions	UK Residents % of Total
Package Trip	40	6
Accommodation (non package trip)	160	24
Travel	130	19
Services or advice	30	4
Buying clothes	60	9
Eating and drinking	160	23
Other shopping	50	7
Entertainment	50	6
Other Expenses	20	2
Total	700	100

Source: United Kingdom Tourism Survey (UKTS)

Notes: Entertainment includes visits to tourist attractions, historic houses, theatre etc. Spending is rounded to the nearest £10 million.

## Location Stayed at in the North East 2004

	UK Residents % of Trips
Seaside	14
Large city / large town	48
Small town	18
Countryside / village	18
Not stated	2

Source: United Kingdom Tourism Survey (UKTS)

## Seasonality of Tourism in the North East 2004

	UK Residents
	% of Trips
Jan, Feb, Mar	21
Apr, May, Jun	23
Jul, Aug, Sep	30
Oct, Nov, Dec	27

Source: United Kingdom Tourism Survey (UKTS)

## Origin of Tourists to the North East 2004

	UK Residents
	% of Trips
Yorkshire	13
North West	10
East Midlands	8
South East	8
East of England	11
North East	18
West Midlands	9
South West	3
London	7
Scotland	10
Wales	1
Northern Ireland	2
Total	100

Source: United Kingdom Tourism Survey (UKTS)

## Accommodation Used in the North East (Volume and Spending) 2004

	% of Trips	UK Residents % of Spending
Hotel / Motel / Guesthouse	30	46
B&B / Farmhouse B&B	8	7
Rented House / Flat / Chalet	2	5
Hostel / University / School	2	1
Friends / Relatives Home	48	33
Second Home / Timeshare	0	0
Camping	3	2
Towed Caravan	2	1
Other	8	6

Source: United Kingdom Tourism Survey (UKTS)

Note: Figures may over add due to more than one accommodation type being used.

## UKTS 2004 – Yorkshire

Source: [www.staruk.org](http://www.staruk.org)

### Volume and Spending of Tourists in Yorkshire 2004

UK Residents	Trips Millions	Nights Millions	Spend £ Millions
Yorkshire	10.0	26.9	704
North Yorks	4.1	12.6	704
West Yorks	3.2	7.3	558
South Yorks	1.6	3.0	192
East Yorks / North Links	1.1	4.0	130
England	101.4	314.0	18,960

Source: United Kingdom Tourism Survey (UKTS)

### Purpose of Trip to Yorkshire (Volume and Spend) 2004

UK Residents	Trips Millions	Spend £ Millions
Holiday, Pleasure / Leisure	4.2	739
Visiting friends and relatives mainly as a holiday	1.5	209
Visiting friends and relatives	2.3	233
Business	1.5	361
Other	0.3	42
All Purposes	10.0	1,584

Source: United Kingdom Tourism Survey (UKTS)

### Average Expenditure in Yorkshire 2004

	UK Residents
Average Spend per Trip	£158
Average Spend per Night	£58

Source: United Kingdom Tourism Survey (UKTS)

### Tourism Spend by Category in Yorkshire 2004

	£ Millions	UK Residents % of Total
Package Trip	40	2
Accommodation (non package trip)	400	25
Travel	290	19
Services or advice	20	2
Buying clothes	180	11
Eating and drinking	420	26
Other shopping	80	5
Entertainment*	120	8
Other expenses	40	2
Total	1,590	100

Source: United Kingdom Tourism Survey (UKTS)

Notes: \* Entertainment includes visits to tourist attractions, historic houses, theatres etc.  
Spending is rounded to the nearest £10 million.

## Location Stayed at in Yorkshire 2004

	<b>UK Residents</b>
	<b>% of Trips</b>
Seaside	17
Large city / Large town	42
Small town	18
Countryside / village	22
Not stated	1

Source: United Kingdom Tourism Survey (UKTS)

## Seasonality of Tourism in Yorkshire 2004

	<b>UK Residents</b>
	<b>% of Trips</b>
Jan, Feb, Mar	21
Apr, May, Jun	28
Jul, Aug, Sep	29
Oct, Nov, Dec	23

Source: United Kingdom Tourism Survey (UKTS)

## Origin of Tourists to Yorkshire 2004

	<b>UK Residents</b>
	<b>% of Trips</b>
Yorkshire	28
North West	12
East Midlands	8
South East	10
East of England	5
North East	9
West Midlands	7
South West	4
London	8
Scotland	7
Wales	3
Northern Ireland	*
Total	100

Source: United Kingdom Tourism Survey (UKTS)

## Accommodation Used in Yorkshire 2004

	<b>% of Trips</b>	<b>UK Residents</b>
		<b>% of Spending</b>
Hotel / Motel / Guesthouse	29	44
B&B / Farmhouse B&B	9	8
Rented House / Flat / Chalet	3	5
Hostel / University / School	1	1
Friends / Relatives Home	43	32
Second Home / Timeshare	*	*
Camping	3	2
Towed caravan	3	2
Other	10	9

Source: United Kingdom Tourism Survey (UKTS)

Note: \* Means less than 1%. UKTS accommodation category definitions. Figures may over add due to more than one accommodation type being used.

## Transport Used in Yorkshire 2004

	<b>UK Residents</b>
	<b>% of Trips</b>
Car	73
Train	12
Regular Bus / Coach	5
Organised Coach	1
Plane	3
Other	6

Source: united Kingdom Tourism Survey (UKTS)

Note: \* Means less than 1%. Transport used on the longest part of your journey from home to the destination. Longest means distance, not time.

## Age Profile of Tourists in Yorkshire 2004

	<b>UK Residents</b>
	<b>% of Trips</b>
16 - 24	16
24 - 34	18
35 - 44	26
45 - 54	16
55 - 64	14
65+	11

Source: United Kingdom Tourism Survey (UKTS)

## Social Profile of Tourists in Yorkshire 2004

	<b>UK Residents</b>
	<b>% of Trips</b>
AB	34
C1	33
C2	17
DE	16

Source: United Kingdom Tourism Survey (UKTS)

Last updated 2<sup>nd</sup> August 2005.

## Summary

- 10 million trips to Yorkshire were made in 2004, with North Yorkshire being the most popular area with 4.1 million visits, and £704 million spent in the region.
- Main purpose of trips to Yorkshire are holiday / pleasure / leisure representing 4.2 million trips.
- Average spend per trip is £158, with an average spend of £58 per night.
- The majority of tourism spend was in the eating and drinking category (26%) with accommodation (non package trip) following closely behind (25%).
- Majority of trips were spent at large city / large town areas (42%). The countryside / village ranked second place (22%).
- The majority of trips to Yorkshire were taken between July, Aug and Sept months (29%), April, May, June were also popular months (28%).
- The origin of visitors to Yorkshire, were local residents, living within the Yorkshire area (28%).
- The main form of accommodation used in Yorkshire was with friends / relatives home (43%). Hotel / motel / guesthouses were the next most popular type of accommodation (29%) with visitors.
- The most popular method of transport used was the car (73%).
- The main age profile of visitors was between 35 – 44 yrs (26%).
- The social profile of tourists was from groups AB (34%), and C1 (33%).

## Transport Used in the North East 2004

	UK Residents
	% of Trips
Car	73
Train	13
Regular Bus / Coach	3
Organised Coach	*
Plane	6
Other	5

Source: United Kingdom Tourism Survey (UKTS)

Note: \* Means less than 1%. Transport used on the longest part of your journey from home to the destination. Longest means distance, not time.

## Age Profile of Tourists in the North East 2004

	UK Residents
	% of Trips
16-24	19
25-34	19
35-44	20
45-54	20
55-64	12
65+	10

Source: United Kingdom Tourism Survey (UKTS)

## Social Profile of Tourists in the North East 2004

	UK Residents
	% of Trips
AB	40
C1	29
C2	17
DE	14

Source: United Kingdom Tourism Survey (UKTS)

## Summary

- 3.8 million trips were made to the North East region in 2004, with Tyne and Wear receiving the majority (2.0 million) trips.
- The purpose of most people's trips to the North East was for holiday / pleasure / leisure.
- The average spend per trip was £180, with £66 being the average spend per night.
- The main tourism spend by categories was accommodation (non package trip) (24%) and eating and drinking (23%).
- The most popular location for trips within the North East region were large cities / towns (48%), countryside / village locations (18%), small town (18%).
- The seasonality for tourism within the North East was between the months July, Aug and Sept. Oct, Nov and December were the next most popular time (27%).
- The majority of trips were made from visitors within the North East region (18%), followed by Yorkshire (13%).
- The most popular type of accommodation used for visitors to the region was friends / relatives homes (48%), and hotel / motel / guesthouse (30%).
- The most popular method of transport used was by car (73%).
- The age profile of visitors to the NE was a combination of 35-44 yrs (20%), and 45-54 yrs (20%).
- The social profile of tourists in the NE was AB (40%) and C1 (29%).

## **Future Trends in Leisure and Tourism**

**The leisure sectors which may be predicted to perform the best over the coming period.**

We currently have an aging population, with large numbers of relatively well off and healthy people retiring early, with time on their hands and money in their pockets.

Spa facilities and other facilities focusing on well-being are a major trend at the moment.

There will always be a strong niche market for active sports, and it is likely that we'll see games such as golf increasing. Meanwhile the restaurant trade is also likely to continue to do well.

Source: Leisure Management (2007) Jan/Feb Issue p. 43

## **General Issues and Impacts on Travel and Tourism**

A recent Civil Aviation Authority Report indicated that the recent growth in air traffic, largely attributed to the arrival of the low cost carriers, is merely continuing a trend that has been going for some time.

The climate change issue is only going to get bigger. Sooner or later travellers will face a significant price hike to cover the environmental cost of their trips.

Source: Leisure Management (2007) Jan/Feb Issue p.43.

From February, Air Passenger Duty will double, with new rates ranging from £10 for economy class flights to European destinations to £80 for business / first class flights to long haul destinations.

Source: [www.tourismtrade.org.uk](http://www.tourismtrade.org.uk)

Therefore domestic tourism may be predicted to rise.

A smoking ban will come into force in enclosed spaces in England from 1<sup>st</sup> July 2007, which will have an impact, especially on the hospitality sector.

Source: [www.tourismtrade.co.uk](http://www.tourismtrade.co.uk)

## **Visit Britain**

### **What is the future of domestic tourism to 2015?**

There are a number of significant themes, which Henley Centre has identified, that could have an impact on domestic tourism in 10 year's time:

#### **Experience Economy:**

As we become affluent, our spending shifts from goods to services; as the process continues further, the types of services we buy shift towards 'experiences' rather than utility.

#### **Well-being:**

One of the strongest of current trends is toward the pursuit of well-being; not just health but an overall sense of wellness. This links to Henley research, which shows that people feel that the resource they most lack in their lives is not money, or even time, but energy.

#### **Changing Social Structures:**

An ageing population, with high divorce rates, and a higher proportion of 'reconstituted families', young adults staying in education (and at home later); more people live on their own; and so on. This all changes the nature of leisure consumption and also makes more important social opportunities with friends and family.

#### **Environmental Importance:**

As climate change moves from being hypotheses to being accepted as 'best science', so individuals and organisations are starting to move their behaviour to less damaging forms of consumption and lifestyle. Public intervention (e.g. through regulation, incentives, and planning practice) all tend to accelerate this.

#### **Urbanisation of Culture:**

A profound shift towards the city as the focus, not just of work but of pleasure as well.

#### **Networked Society:**

People are more networked, especially with each other, through the Internet and mobile. This has implications for authority and the importance of peer group opinion, and so on. But over the next 10 years, the environment as well as the people will start to be networked.

#### **Fragmentation of Leisure:**

Customers are more demanding, and more empowered (partly through a combination of affluence and networks). In leisure as well as elsewhere, there is a greater fragmentation of the offer to match specific tastes, preferences and requirements.

**Entitlement:**

Public policy emphasises entitlement of all. It is a cultural expression, which has its roots in the human rights movement, as embodied in the UK in the Human Rights Act. The strongest cultural expression has been in arts and sport. It is a strong trend. High noise activities (such as quad biking for example) are likely to follow. This scenario is about holidays in which private land and locations are used for these socially disapproved of activities.

**Deep Peace:**

Well being taken to its logical conclusion, mental or psychological asceticism is added to the physical cleansing found in spa offers. Location matters, quiet matters; but this may well be combined with learning and personal development.

**Events:**

The big free public festival, or public event. Likely to be rooted in the distinctive traditions of the place. We also expect to see the rise of 'public works' holidays where people spent their time with like-minded others restoring community assets the things that make places distinctive; a combination of physical labour, social purpose; and shared meaning.