Visitor Economy and Transport in the North of England

Final Report

Transport for the North

July 2021

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1. Introduction

1.1. Context and Aims

Atkins is pleased to have supported Transport for the North (TfN) on this commission to better understand the North of England's visitor economy and its links to transport and travel demand. This report, developed based on research conducted between January and July 2021, presents the final study findings and recommendations.

1.1.1. Aims and objectives of the study

Transport for the North's Strategic Transport Plan[1], published in 2019, identified the visitor economy as an important sector of the North's economy, with the area boasting an array of historic and vibrant towns and cities together with seaside resorts and National Parks. The Strategic Transport Plan recognised the importance of the role played by the transport network to support the North's visitor economy, and the need for transformed transport linkages to realise the growth potential of the sector.

TfN commissioned this study to update and expand the existing evidence base on the visitor economy across the North of England and its relationship with transport, to develop an understanding of the impacts of the Covid-19 pandemic on the visitor economy in the North, and to develop recommendations for TfN and TfN's partners regarding interventions which could support the sustainable recovery and future growth of the visitor economy in the North of England. This study will form an important part of the pan-Northern evidence base that informs the work of TfN and TfN's partners. It will provide robust evidence to support the design and delivery of TfN's programmes, and to inform future investment decisions.

This report has been prepared in light of the study aims and objectives:

1. Develop a profile of the visitor economy and its sub-sectors/segments across the North to highlight the key features of the visitor economy in different types of places, both from the supply side and the demand side
2. Identify the importance and value of the visitor economy and its sub-sectors across the North (including direct and indirect economic impact in quantitative terms, as well as the social, environmental, quality of life and place-making impacts in qualitative terms)
3. Explain the role of transport in supporting the visitor economy, by estimating the level of demand that the visitor economy places on the transport network across different modes of transport, as well as considering the role that new transport interventions can play in stimulating growth in the visitor economy
4. Analyse the impact that Covid-19 has had on the different visitor economy segments in different types of places across the North, and comment on the potential longer-term impacts of the pandemic on different segments of the sector
5. Make recommendations for TfN and TfN's partners regarding potential interventions and policies to support the short-term recovery of the sector in the context of Covid-19, and to stimulate the longer-term sustainable growth of the visitor economy

1.1.2. Project Steering Group

Transport for the North established a Visitor Economy Steering Group to support and oversee the delivery of this commission and a related commission – Visitor Economy Modelling and Appraisal (outlined in detail below). The purpose of the Visitor Economy Steering Group was to provide expertise, advice and oversight to enable the successful delivery of these commissions.

The Visitor Economy Steering Group contributed to the scoping of the commissions and the development of definitions, research methodologies and approaches. The Steering Group members also provided or facilitated access to sources of local data and intelligence which supplemented other secondary data sources analysed as part of the study. Some of the Steering Group members also took part in stakeholder engagement workshops delivered as part of the commission. The Group also reviewed interim and final outputs and provided invaluable information and feedback.

The Visitor Economy Steering Group comprised a range of strategic stakeholders across local and national government, National Park Authorities, destination management organisations (DMOs) and transport industry stakeholders.

[1] https://transportforthenorth.com/wp-content/uploads/TfN-final-strategic-transport-plan-2019.pdf

Visitor Economy Project Steering Group Membership

- Blackpool Council
- City of York Council
- Cumbria County Council
- Department for Transport
- Highways England
- Lake District National Park Authority
- Liverpool City Region Combined Authority
- Marketing Manchester
- Network Rail
- NewcastleGateshead Initiative
- Northumberland National Park Authority
- North York Moors National Park Authority
- North Yorkshire County Council
- Peak District National Park Authority
- Yorkshire Dales National Park Authority
- York & North Yorkshire LEP

1.1.3. Related Commission - Visitor Economy Modelling and Appraisal

Transport for the North has commissioned this study in parallel to another project seeking to develop improvements to TfN's Analytical and Appraisal Frameworks to provide a more accurate representation of the Visitor Economy in transport business cases. These commissions have been delivered in a collaborative and complementary manner.

Traditional transport modelling approaches create an 'average weekday' of travel demand, segmented by a number of purposes, usually Commute, Business and Other. This creates a focus on 'average weekday' appraisal which ignores the variety of time and season profiles in the North.

In order to remedy this, TfN commissioned RAND Europe and Mott MacDonald to deliver:

- A review of the existing data and evidence available
- A method to quantify which areas of the North need to be considered in a visitor economy appraisal
- A method to deliver tools to build explicitly modelled seasonal demand
- Tools to quantify user benefits derived from the demand adjustments above, to be integrated into TfN's modelling framework, the Analytical Framework.
- An application of the appraisal tools above to Northern Powerhouse Rail (NPR) business case, to quantify the benefits available to the scheme from the visitor economy.

As an outcome of this work, an appraisal of a 'busy day' matrix will be included in the NPR business case. This will quantify scheme benefits to the North, when considering a 'busy day', as opposed to the traditional 'average weekday' approach. This will result in the creation of a standardised process (embedding the analysis into existing evaluation tools), meaning it can be considered along with traditional benefits for all future TfN schemes.

Furthermore, the research underpinning this commission will be comprehensively integrated into the Analytical Framework's demand tools. This will mean that the impact of the visitor economy can be expressed in abstract demand for any given busy time period for any given region. This will allow even more flexible options for scheme building, further breaking down the average hour.

As the work is integrated into the demand framework, TfN's partners and stakeholders will have access to the following through the Analytical Framework:

- Integrated demand building and forecasting tools
- Tools of rail evaluation for the visitor economy
- Travel demand datasets including explicit visitor segments

1.2. Background to this Commission

Prior to this study, two projects have examined similar themes. A brief overview of the outputs of these studies is provided below to provide context for this study.

1.2.1. Visitor Economy and Transport Demand in the North of England

In 2018, Transport for the North and Merseytravel published a report outlining the function and importance of the visitor economy to the North of England, which made recommendations on how demand from the visitor economy sector should be incorporated into transport modelling[2]. At the time, the visitor economy was attracting approximately 369m visitors to the North of England, including more than 33m on staying trips (domestic and overseas), generating a visitor expenditure of over £17bn, including over £2bn from overseas visitors to the UK.

The importance of the visitor economy to the North of England was summarised across four areas:

- **Impact on local economy** – direct and indirect impacts of tourism expenditure
- **Public realm** – making a destination attractive and offering services for visitors which also has a positive impact for residents
- **Supporting domestic and international linkages** – increased visitor levels enable additional transport links which will also provide facilities for local businesses and residents
- **Inward investment** – the visitor economy raises the profile as a location for inward investment

The report articulated a broad definition for the visitor economy, which can be summarised as the goods and services consumed by those who are 'visitors' to a destination. Although the definition of the visitor economy is not complex, the report notes there are issues with categorising and quantifying its contribution to the economy. For example, the economic value of hotel stays can be easily quantified, however the same cannot be said for bars and restaurants, where it is more difficult to attribute spending and economic output to visitors or local residents.

The report also identifies a strong relationship between the visitor economy and transportation, noting that the visitor economy generates significant transport demand, while simultaneously the provision of transport enables the growth of visitor destinations. Consequently, the report argues the North's transport network must provide good quality access to and from international gateways, between core cities and major leisure destinations, and to localised markets, in order to successfully support the visitor economy.

Trends with inbound visitors from abroad show that despite the impact of recessions and other 'shocks', growth remained on an upward trajectory between 2001 and 2016 both nationally and within the North. In terms of domestic visitors, the 2008 recession saw the reversal of a previous long-term decline in domestic staying visitor numbers. The phrase 'staycation', coined by VisitBritain, was used to represent the increase in domestic holidays resulting from lower spending power, employment uncertainty and higher costs for overseas travel. Overall, when combining the level of domestic trips with visits made abroad, the total number of trips made by UK residents has risen over time. Part of this trend is that there are fewer 2-week holidays being taken, and an increase in short breaks.

1.2.2. Future Travel Scenarios

TfN have developed a suite of Future Travel scenarios[3] in response to the growing levels of uncertainty currently facing the North's transport network from a range of external factors, including the ongoing Covid-19 pandemic, and the social, behavioural, spatial and economic shifts this has brought about or accelerated. The purpose of the Future Travel Scenarios is to build on the policy positions outlined in TfN's Strategic Transport Plan, and to inform the development of future insights and policies. When developing the four scenarios, five external strategic factors were identified as particularly shaping the policy environment and travel demand trends:

- Growth in the population and economy
- Spatial planning policy and economic distribution
- Technological advancement and uptake
- Social and behavioural change
- National policy on environment and sustainability

Taking the above factors into consideration, the report outlines four potential future scenarios which embrace uncertainty and the links between social, environmental and economic actors in shaping future transport demand.

[2] https://transportforthenorth.com/wp-content/uploads/Visitor-Economy-and-Transport-Demand-in-the-North-Analysis-min.pdf
[3] https://transportforthenorth.com/future-travel-scenarios/

Just About Managing	Digitally Distributed
This scenario sees a state of inertia, a future where people do not alter their behaviours much from today, or give up certain luxuries, although there is a gradual continued trend towards virtual interaction. Economic growth continues at a moderate rate, but it is largely consumption-led and unequal, lacking agility and vulnerable to shocks. This scenario is led by markets, without much increase in political direction, with its biggest driver being economic.	This scenario sees an acceleration in digital and technological advances, transforming how we work, travel and live. Technological changes, and the move towards a distributed, service-based transport system are embraced. Climate change targets are met, but there is slow progress in the short-term due to preference for individualised mobility. This scenario is led by technological development, and subsequent willingness to embrace MaaS and shared mobility.
Prioritised Places	**Urban Zero Carbon**
This scenario sees a significant shift in political and economic direction to ensure that no place is left behind. Every area, including urban, rural and coastal areas, has a bespoke local economic strategy, supported by investment in local assets, specialisms and economic and social infrastructure. Community, localism and place-making is applied to build a sense of local identity to improve local economies. There is a focus on work-life balance and social equity within and between places. This scenario is led by a change in priorities, with its biggest driver being the push for a fairer redistribution of economic prosperity.	This scenario sees a significant shift in public attitudes towards action on climate change, and strong national Government response to meet it. There is a boost to economic, primarily through a combination of urban agglomeration and place-making. Transport users demand and embrace publicly available transit and active travel options, as there is a blurring of the line between 'public' and 'private' with increasing shared mobility systems online. This scenario is led by attitudes to climate action and urban place-making, with the biggest drivers being strong Government policy and trends of urban densification.

The full report highlights the additional uncertainty and disruption caused by the Covid-19 pandemic and highlights the ways this has potentially led to fundamental shifts in the way we move and more fundamentally, what we deem important. The report highlights that there will inevitably be at least a partial reversal to pre-pandemic trends, but some changes will remain, and other new trends will emerge as society decides how best to recover from the crisis. This includes trends such as the growth in active travel, increased levels of remote working, an acceleration in the uptake of online shopping, and a greater focus on achieving a work-life balance as people have benefited from reduced commuting times.

1.3. Key Definitions

At the inception of this study, the following definitions of key terms were agreed between the Project Team, TfN, and the Project Steering Group. These definitions were developed based on academic research and expert knowledge, while ensuring alignment with previous studies and central data sources was maintained. These definitions are used throughout this report, and informed the methodological approach taken by the study team.

Visitor Economy

The visitor economy encompasses both the direct and indirect contributions to the economy resulting from a visitor travelling outside their usual environment for holiday, leisure and events such as concerts and sports, retail, festivals, business such as conferences and exhibitions, education, and visiting friends and relatives.

Broadly, the visitor economy encompasses:

- All **the things that attract visitors** e.g. regional destinations, the natural environment, heritage and culture, iconic buildings, leisure and cultural facilities, sport, retail, food, gardens, events and scenery – in essence, things that make the place special and distinctive
- The **infrastructure that supports the visits** e.g., transport, signage, parking, interpretation/orientation, public space & amenities – essentially re-enforcing a sense of place and making it easy to access
- The **services that provide for the needs of the visitor** e.g. accommodation, pubs/restaurants, galleries, and services that create a safe, clean and welcoming environment – therefore promoting economic and social activity and generating an increase in spend

(Sources: Balding et al, Reddy)

Visitors

A visitor is someone who is making a visit to a main destination outside their usual environment for less than a year for any main purpose, including: holidays, leisure and recreation, business, health, education, or other purposes.

Broadly, this definition encompasses:

- **Staying visitors** – visitors that are staying away from home for one or more nights for any of the purposes noted above
- **Day visitors** – spending at least 3 hours away from home outside their usual environment for general leisure, recreation and social purposes (many will be residents of a local area)
- **Leisure day visitors** – residents of destinations and their local catchment areas, visiting an alternative destination for the day as part of their longer trip (generally not included in published volume and value statistics)

(Sources: UNWTO statistics Guidelines/The Tourism Society)

Visits

Defined by visitor purpose, and includes:

- Holidays/short breaks
- Business related – such as conferences/exhibitions
- Day trips
- Events
- Visiting Friends and Relatives
- Education

(Source: Merseytravel)

Evidence Base

2. Literature Review

2.1. Introduction

To understand the extent of existing research on the visitor economy in the UK and across the North of England, and to examine whether there are any gaps in existing research, a desk-based review of existing literature and research into the visitor economy was undertaken. The following sections outline the main findings of the Literature Review. Where gaps have been identified in existing research and literature, these have been used to inform the research objectives which underpin the subsequent phases of this study, with an aim of addressing these gaps where possible.

2.2. The Visitor Economy

2.2.1. The UK

Prior to the Covid-19 pandemic, the UK's visitor economy was predicted to grow at an annual rate of 3.8% through to 2025. This was greater than growth predictions for the overall UK economy (3% per annum), and much greater than sectors such as manufacturing, construction and retail. The industry was expected to be worth over £257 billion by 2025 – just under 10% of UK GDP and supporting approximately 3.8 million jobs[4]. The UK Government's tourism policy aims to help the tourism industry achieve its potential as a central part of Britain's growth strategy through:

- Co-funding marketing campaigns with the private sector to attract more visitors to Britain
- Increasing the proportion of UK residents who holiday in the UK
- Improvements to the sector's productivity, helping it to become one of the top five most efficient and competitive visitor economies in the world.[5]

The 40.9 million overseas visitors who came to the UK in 2019 spent £28.4 billion; 77% of these were repeat visitors[6]. In 2019, London accounted for 55% of all inbound visitor spend, the rest of England 32%, Scotland 9% and Wales 2%[7]. This highlights that London remains the key draw within the UK, even for those who have visited before.

Existing research identifies that knowledge of British destinations other than London can be low, and the most common practical barrier to going outside London are concerns about transport and access[4]. Therefore, research on the visitor economy and its associated transport provision is critical to overcoming this barrier. The most common attractions which encourage visitors to the UK to explore beyond London are heritage, variety, countryside, unique places to stay, and the culture and warmth of the British people[7]. The North of England is well placed to provide visitors with these attractors, enabling it to entice and sustain demand from both international and domestic visitors.

2.2.2. The North of England

2.2.2.1. Context

Previous research by Merseytravel undertaken on behalf of TfN has identified that the North of England attracts over 350 million visitors each year. Of the North's constituent regions, the North West receives the most visitors, followed by Yorkshire and the Humber and then the North East[8].

Generally, there is a lack of knowledge regarding what the North can offer international visitors, meaning visitors can often overlook Northern beauty spots for what Scotland and Wales have to offer[7]. Research by Visit Britain shows that there are some negative industrial associations with Northern England, often linked to old-fashioned stereotypes[7]. Despite this, there are significant positive associations with England's Northern cities such as football, nightlife and shopping[7].

The study, undertaken in 2018, identified that amongst the North's towns and cities, Manchester, Liverpool, Leeds, Newcastle, and York receive the most overseas visitors[8]. Countries that can access the North much

[4] Britain's visitor economy facts | VisitBritain
[5] visitor-economy-potential-f2a.pdf (local.gov.uk)
[6] Britain's visitor economy facts | VisitBritain
[7] 2013-7 'Beyond London' Research_5_1.pdf (visitbritain.com)
[8] https://transportforthenorth.com/wp-content/uploads/Visitor-Economy-and-Transport-Demand-in-the-North-Analysis-min.pdf

more easily, such as Norway, see the North in a more positive light than countries which can access the South and London more easily, such as France[7]. Again, this shows a significant link between the visitor economy and accessibility/transport provision.

When considering domestic staying visitors (“staycationers”), there is an increased knowledge of the North of England and what it has to offer. Staycations have been on the rise, with the trend of an increased level of short breaks (long weekend trips), and generally the North of England has had a much larger share of the total domestic overnight trips in England (29% compared to 14% of all overseas staying trips)[5]. Manchester, Scarborough, Leeds, Liverpool and Blackpool attract the most domestic visitors across the North[5].

Revenue generated by day visits makes up a significant proportion of the visitor spending profile across the North of England (roughly 63%). The North of England provides 9 of the 20 most visited areas in England by day visitors, with Manchester, Leeds, Liverpool, Sheffield and Cheshire West seeing the greatest numbers[8]. Knowledge of what the North of England can offer within this group is also high.

2.2.2.2. The North’s Visitor Assets

The North of England benefits from a wide range of visitor assets reflected by the significant number of both day and staying visitors. Broadly, these assets are found in coastal, rural or urban environments. The following sections outline some of the North’s key visitor economy assets across the three types of environment.

2.2.2.2.1. Coastal Areas

Coastal areas and resorts are a key asset to the UK’s domestic visitor economy, with the North being home to some of the most popular seaside destinations in the UK[9]. While destinations in the South West and South East receive the majority of overnight seaside trips, the North still caters for a large proportion of national seaside trips, in particular Yorkshire & The Humber and the North West, which represent 13% and 10% of total domestic overnight seaside trips respectively[9].

Both overnight and day trip visitors of coastal areas are most likely to be from the region they are visiting. Figures from a 2012 report by VisitBritain, while dated, identify that within the North West, 41% of overnight trips to coastal areas are made by people who live in the region. Similarly, Yorkshire and Humber residents represented 57% of overnight trips to the coast within their region[9]. In respect of day trips, this trend is even stronger as it becomes more important to minimise the time spent travelling in order to maximise time spent at the destination. Peak times of travel are, unsurprisingly, during the summer months, although there is still a notable number of trips made in off-peak periods[9].

The number of overnight holidays to coastal areas in the UK spiked after the 2008 financial crisis[2,9] as people looked for more budget friendly holidays. Coastal areas are traditionally seen by the public as low-cost holiday destinations, especially when compared to holidays abroad, and it is expected that the financial impact of Covid-19 alongside the associated restrictions on international travel, will result in an increase in domestic trips to coastal areas, presenting a potential opportunity for the visitor economy in the North of England to attract new visitors to the area.

2.2.2.2.2. Rural Areas

Alongside the significant attraction of coastal areas, the North of England boasts five National Parks and significant Areas of Outstanding Natural Beauty (AONB) which provide a strong natural, cultural and heritage offer. A large part of the North’s visitor offer is represented by the National Parks and surrounding areas of natural beauty, where 58% of visitors come to enjoy the scenery and the landscape (the main reason for visiting a National Park)[10].

VisitEngland’s report into Domestic Tourism notes that in 2014 there were 17.08 million trips to rural areas as part of domestic overnight trips in England, representing 18% of the total, and generating a spend of £3.1 billion. Additionally, 340 million day trips which included a visit to the countryside were also recorded. This equates to 25% of the total and resulted in a spend of £8.4 billion[11]. While dated, these figures provide useful insight into the value and importance of rural tourism as part of the wider visitor economy.

The importance of the countryside is noted by Welcome to Yorkshire, who highlight the countryside as one of five key themes to attract more international visitors noting that “78% of those going beyond London did so

[9] https://www.visitbritain.org/sites/default/files/vb-corporate/Images/England-stats-insights/seaside_report_final_v2_without_summary.pdf
[10] https://www.nationalparks.uk/app/uploads/2020/10/Tourism-in-UK-National-Parks-Information-sheet.pdf
[11] https://www.visitengland.com/sites/default/files/countryside.pdf

because of Britain's unique and beautiful countryside" and "countryside was a major lever to convey unique, different, beautiful and relaxing experiences"[12].

Surveys undertaken prior to the emergence of the Covid-19 pandemic have identified that visitors to the North's National Parks and other rural areas are generally from an older demographic, however this has varied depending on the purpose of the visit – for example those visiting the region to climb the Yorkshire Three Peaks are generally a much younger and more male dominated group of visitors compared to the average for the National Park[13]. National Parks are a popular location for holidays; because of this, visitors to some parks, such as the Lake District, are more likely to stay overnight and for increasingly longer periods[14]. Visitors to the North York Moors National Park are also beginning to stay for longer and are now as likely to be overnight visitors as day visitors.[13] Conversely, in the Yorkshire Dales, Northumberland[15] and Peak District[16] National Parks, most people are day visitors. Anecdotal evidence from the project Steering Group suggests limited accommodation in some National Parks may be constraining the growth of overnight visitor numbers and contributing to travel demand as people stay outside National Park areas and travel in to visit and participate in events.

Furthermore, research conducted by Natural England in relation to people's experiences of the natural environment[17] revealed that in terms of enjoyment and satisfaction, beaches, alongside other rural locations such as woodland, hills and farmland, tended to result in the highest levels of enjoyment, relaxation and feeling close to nature. Given the clear impact of the Covid-19 lockdowns in which walking featured strongly as an activity to be undertaken on a more regular basis, opportunities to strengthen this activity, promoting health and well-being will need to be encouraged in the future.

2.2.2.2.3. Urban Areas

The final element of the North's visitor offer relates to towns and cities which generate demand both from leisure tourism and business tourism. Towns and cities in the North attract significant demand from overseas visitors, to the extent that 5 northern cities (Manchester, Liverpool, Leeds, Newcastle and York) are represented in the top 20 most visited destinations in the UK[8]. The high ranking of these Northern cities is thanks to their many attributes including strong culture and heritage, which includes ancient history, music, museums, events, art galleries, industrial heritage, and award-winning architecture.

In contrast to rural areas and National Parks, the North's cities generally attract a younger demographic. For example, research on Manchester's visitor economy has identified that 48% of visitors are aged 34 or under[18]. Some cities, such as York, do attract a more mature demographic, with recent figures from Visit York identifying over 40% of the city's visitors fall within the 45-64 age bracket[19]. Again in contrast to the North's rural areas and National Parks, visitors to the North's cities are more likely to travel by public transport, with 39% of visitors to York[20] and 49% of visitors to Manchester arriving by train[18].

The cultural and heritage offer of the North's cities is exemplified by Liverpool and Hull, which have respectively been European Capital of Culture[21] and UK Capital of Culture[22]. Many of the North's other towns and cities are home to nationally important museums, concert halls, and galleries. These include the Royal Armouries Museum, Opera North, Leeds Art Gallery, and Kirkstall Abbey in Leeds, the National Football Museum, Science and Industry Museum, and Bridgewater Hall in Manchester, Millennium Gallery and Weston Park Museum in Sheffield, BALTIC Centre for Contemporary Art and The Sage Gateshead in Tyne and Wear, and JORVIK Viking Centre and National Railway Museum in York. The combination of the strong cultural offer of the North's cities, alongside their food, beverage and accommodation offer, makes them ideal destinations for city breaks.

The North's cities also have a strong sports offer. The most attended sport in the North is football. During the 2018/19 football season, seven of the twenty premier league teams were located within the North. A total attendance of over 6 million attended premier league matches in the North during this season. A further 27 football teams located in the North competed in League 1 or League 2 during the 2018/19 season, attracting an attendance of more than 6.7 million[23]. Rugby, in particularly Rugby League, is also a popular sport within the

[12] https://issuu.com/welcometoyorkshire/docs/wty_tourism_data_january_2020?fr=sODdiMTcwOTA4Mg
[13] YDNAP - 3 Peaks Survey 2019, provided by project Steering Group member
[14] Cumbria Visitor Survey 2018, provided by project Steering Group member
[15] Northumberland National Park Authority: Visitor Survey 2018
[16] https://www.peakdistrict.gov.uk/__data/assets/pdf_file/0030/63876/Vistor-and-Non-Visitor-Survey.pdf
[17] Monitor_Engagement_Natural_Environment_2018_2019_v2.pdf (publishing.service.gov.uk)
[18] Greater Manchester Leisure Visitors Survey 2018, supplied by project Steering Group member
[19] https://www.visityork.org/dbimgs/Quarterly%20Visitor%20Survey%20Aug%20Oct%202020%203_highres.pdf
[20] https://www.visityork.org/dbimgs/YorkVisitorSurvey2018-SummaryInfographic.pdf
[21] Liverpool Capital of Culture: A Decade Of Growth - RWinvest (rw-invest.com)
[22] Hull: City of Culture | British Council
[23] https://www.worldfootball.net/attendance/

North and attracts large attendances. Eleven of the twelve teams competing in the 2021 Rugby League Super League are located in the North[24].

Horseracing also attracts significant crowds within the North, with nationally important racecourses found in Aintree, Chester, Doncaster, and Haydock Park. The North is also home to three First-class county cricket teams (Durham, Lancashire and Yorkshire) who play at The Riverside Ground (Chester-Le-Street), Old Trafford (Greater Manchester) and Headingly (West Yorkshire). Additionally, these stadia regularly host England international cricket games of differing lengths from one day events to five-day test matches. Other national / international events held in the North include the UK Snooker Championship in York, National Cycling Championships in Manchester and the World Snooker Championship held at the Crucible Theatre in Sheffield.

Yearly events also attract a significant number of attendees. The Tour de Yorkshire cycling event which has occurred every May since the successful Tour de France Grand Depart in 2014 attracted 2.2 million spectators in 2017[25]. Participatory sporting events also attract significant numbers of people to participate in sport. The main example of this is the Great North Run which attracts 57,000 competitors, and other events of varying sizes taking place across the North[26].

The North's cities are also important locations for business to meet and hold events, at a regional, national and international scale. Research by Visit Britain identifies the North receives 27% of domestic business trips[27], rising to 31% of international meeting, incentive and team building, conference, and event visits[28]. Manchester has a particularly significant conference and business events industry, which was worth £862m to the economy in 2017, supporting over 35,000 jobs[29]. The neighbouring city of Leeds is also an important hub for business visits and events. Data extracted from the Visitor Economy Impact for Leeds report highlights that the value of business tourism to the Leeds economy has been assessed as £543.3 million, and the city is considered as being the 5th most popular conference centre in the UK, welcoming 3.5 million delegates and hosting 52,400 meetings, conferences and events each year[30].

2.3. Strategies and Policies

A range of organisations across the North of England have published visitor economy and tourism strategies for geographies under their remit. These documents broadly develop their own objectives in line with the overarching strategies outlined by the *Britain Tourism Strategy: Delivering a Golden Legacy: a growth strategy for inbound tourism 2012 - 2020*[31] and *England: A Strategic Framework for Tourism 2010 - 2020*[32]. These high-level strategies outline four objectives as part of their overall strategy for Britain:

- Enhance Britain's image
- Ensure that Britain is packaged and sold
- Broaden Britain's strong product offering
- Make visiting Britain easier (air routes, ferry routes and visas)

A further influence is the Department for Culture Media and Sport's *Tourism Action Plan*[33] which launched the Discover England Fund, with key themes being:

- The tourism landscape
- Jobs and skills
- Common sense regulation
- Transport
- A great welcome

[24] https://www.superleague.co.uk/stats/club-stats
[25] https://www.insidermedia.com/news/yorkshire/tour-de-yorkshire-breaks-attendance-records#:~:text=A%20total%20of%202.2%20million,popular%20event%20since%20its%20inception.
[26] https://www.chroniclelive.co.uk/all-about/great-north-run
[27] https://www.visitbritain.org/sites/default/files/vb-corporate/england_business_trips_2019.pdf
[28] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_178_-_understanding_business_visits.pdf
[29] https://www.marketingmanchester.com/wp-content/uploads/2019/06/GM-Business-Tourism-Strategy-2019-2025.pdf
[30] Leeds visitor economy Impact, summary supplied by project Steering Group member
[31] https://www.visitbritain.org/britain-tourism-strategy
[32] https://www.visitengland.com/sites/default/files/downloads/strategic_framework_for_tourism_document_1.pdf
[33] Tourism Action Plan -1 year on A5 report (publishing.service.gov.uk)

The summary below highlights common themes identified from various Northern visitor economy strategies.

2.3.1. Identity and Brand

A key and common theme across all the strategies is the need to develop the identity and brand of the various regions and how they are marketed. Establishing what makes the area different, and attracting visitors that align with this, has been a common goal across the Northern region. For urban areas, there is a focus on exploiting culture and entertainment. Examples include Manchester's push on 'original modern'[34] as the city's brand and their aim to develop as a leading events destination, and Liverpool's "Liverpool = Culture"[35] marketing strategy, reflecting the city's deep history in music, entertainment and historic culture (e.g. Beatles museum, art galleries, industrial heritage).

Amongst rural areas and National Parks there is an emphasis on heritage, exploration, and relaxation. This is exemplified by Lancashire's visitor economy Strategy and Destination Management Plan, which states their vision *"for the county's cultural, countryside and heritage offer to be the main reasons that visitors choose to visit Lancashire"*[36]. This is also reflected in the development aspirations of many areas. For example, the North York Moors Local Plan highlights that *"Proposals which are based on the special qualities of the National Park and lead to a greater understanding of the North York Moors' evolution, natural processes, cultural heritage, and of how it functions today are more likely to be supported"*[37].

Another common theme across the different regions is the push to attract major events; larger cities often focus on entertainment and music events such as festivals, while other areas focus more on historical events which attract niche markets. Within the North, this is exemplified by Manchester's event offer which includes Manchester Pride and the Manchester Christmas Markets. In contrast, rural areas such as Cumbria and Cheshire have traditionally offered events such as agricultural shows and farmers markets, but more recently have seen significant growth in outdoor activity events such as the Great North Swim. Common in both urban and rural areas are festivals such as Parklife, Leeds Festival, and Kendal Calling, which attract visitors from across the North and often beyond.

2.3.2. Marketing and Investment

Digital marketing is an increasingly important area for investment to enable growth of the visitor economy through the discovery and booking of trips, activities and experiences online. As highlighted by Marketing Peak District and Derbyshire, online marketing and discovery is particularly important for National Parks and rural areas, which often do not receive the same level of media coverage as urban areas. Investment in new marketing channels and forms of communication is needed to keep abreast of changing consumer trends and to attract new types of visitors[38].

Investment into the visitor economy will come from a number of sources, including national funding pots such as the Discover England Fund and more local funding from local councils. A number of regions are also focused on attracting private sector and inward investment in sectors such as housing and hotels to cross-fund development, leading to regeneration and subsequent attraction of more visitors, which in turn supports broader economic growth.

2.3.3. Sustainability and Environmental Impact

Existing literature highlights the importance of ensuring the growth of the visitor economy is undertaken in a sustainable manner, whereby increases in visitor numbers or new developments are met with efforts to reduce any additional environmental impacts. Existing research identifies that 93% of those who visit UK National Parks travel by car[39]. Research by Cumbria Tourism has identified that 87% of visitors to the Lake District National Park arrive by car, generating significant emissions and environmental impacts. While this is below the national average of 93%, visitors driving *to* the Lake District generate 322,000 tonnes CO_2 emissions, while a further

[34] https://www.marketingmanchester.com/wp-content/uploads/2017/02/tourism-strategy-2013.pdf
[35] http://www.knowsley.gov.uk/pdf/LC09_LiverpoolCityRegion-VisitorEconomyStrategy2020.pdf
[36] https://www.marketinglancashire.com/app/uploads/2018/04/Lancashire-VES-FINAL-PRINT-low-res.pdf
[37] https://www.northyorkmoors.org.uk/planning/framework/local-plan/Local-Plan-FINAL-DRAFT.pdf
[38] The Peak District and Derbyshire Growth Strategy for the visitor economy
[39] https://www.cnp.org.uk/sites/default/files/uploadsfiles/180226%20National%20Parks%20for%20all%20Making%20car-free%20travel%20easier%20FULL%20REPORT.pdf

205,000 tonnes CO_2 emissions result from visitor car travel *around* the Lake District. In comparison, residents of the park contribute only 165,000 tonnes CO_2 emissions from personal car travel[40].

Current reliance on the private car to visit rural areas and the North's National Parks can potentially be diminished by investment in local transport services, off-road cycle routes, the promotion of active modes, behaviour change initiatives, and the adoption of new and emerging technologies such as e-bikes and e-scooters. This is also an issue for major cities and urban areas, where public transport initiatives are being encouraged. In many areas, local transport plans will include objectives and ambitions around public transport provision and active travel for visitors as well as residents.

There is a growing recognition of the importance of supporting and encouraging visitors to use sustainable transport modes. For example, Lancashire County Council are using the Sustainable Transport Fund to develop cycling routes and facilities in the area to reduce car usage[41]. A further example is The Wirral Partnership, who have stated their intention to work with local groups, land managers and custodians to improve sustainable routes as well as increasing the number of awards for sustainable tourism initiatives which will encourage partners and also enable success to be measured[42].

2.3.4. Skills and Employment

In order to grow the North's visitor economy, it is important to invest in workforce skills to support the growth potential of Small and Medium sized Enterprises (SMEs), entrepreneurs and established businesses. Across the literature, a number of common skills for investment to support the hospitality and tourism industries are identified. These include management, leadership, customer service, culinary / chefs, and languages[43]. For both urban and rural areas, there is a focus on targeting and encouraging the younger generations to choose tourism and hospitality related industries for a first-choice career[44].

The Local Government Association (LGA) highlights that Councils and local leaders are playing a key role in capitalising on the growth potential of local Visitor Economies by creating the right conditions for the sector to grow and thrive, and also by facilitating a rich cultural offer to attract visitors to places. The LGA also highlights the opportunities to further drive growth through increased productivity, meaning visitors spend more when they visit[45].

Places such as The Wirral[46] and Leeds[47] have responded by partnering with local colleges to improve skills among young people. In rural areas such as North Yorkshire, the importance of developing young people's skills to enable them work in the visitor economy has been highlighted. By supporting the development of relevant skills, it is hoped to support the retention of young people and therefore ensure the sustainability of local communities[48]. Other parts of the North have identified similar issues, leading to the introduction of a Peak District and Derbyshire visitor economy apprenticeship scheme[49] to help reduce the skills shortages in these areas.

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40 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/738272/lstf-visitor-travel-case-study-final-report.pdf
41 https://www.marketinglancashire.com/app/uploads/2018/04/Lancashire-VES-FINAL-PRINT-low-res.pdf
42 https://www.wirral.gov.uk/sites/default/files/all/About%20the%20council/Wirral%20Plan/Wirral%20Tourism%20Strategy.pdf
43 Hospitality and Tourism workforce landscape (publishing.service.gov.uk)
44 Supplying skills for the local visitor economy
45 visitor-economy-potential-f2a.pdf (local.gov.uk)
46 https://www.wirral.gov.uk/sites/default/files/all/About%20the%20council/Wirral%20Plan/Wirral%20Tourism%20Strategy.pdf
47 https://www.the-lep.com/media/2132/leeds-city-region-destination-plan.pdf
48 https://www.businessinspiredgrowth.com/wp-content/uploads/2017/01/Growing-the-Visitor-Economy-of-the-Protected-Landscapes-Prospectus-v-1.1-FINAL-1.pdf
49 http://mediafiles.thedms.co.uk/Publication/DS-MPDD/cms/pdf/Branded%20Destination%20Plan%20document.pdf

2.4. Visitor Segmentation and Market Potential

2.4.1. Segmentation

By looking at what people do when they travel, who the traveller is and why they are travelling (motivation and needs) VisitEngland's *Project Lion*[50] produced five different personas as typologies for domestic tourists. These personas are helpful to illustrate the types of leisure visitors who travel domestically within the UK:

1. **Country loving traditionalists**
   Older, empty nesters (those whose kids have left home) with average household income
2. **Fun in the sun**
   Middle aged people, often families, looking for a beach break. Keen on sociable alternatives to hotel accommodation such as caravanning and camping. Visitors in this segment tend to have average incomes
3. **Fuss free value seekers**
   Largely comprised of under 25s and over 65s, looking for value for money while travelling. This is a reflection of budget as most of them will be students or retirees
4. **Free and easy mini breakers**
   Generally this type of visitor is mainly under 30, with no kids, and earning an average income. This segment favours activities such as shopping, exploring the city and cultural entertainment
5. **Aspirational family fun**
   People in this bracket are typically city based (usually London) high earners with children, engaging in activities such as festivals, music, sporting and cultural events

2.4.2. Emerging Markets

It is also important to consider Generation Z, born in the mid-1990s onwards, as an emerging segment in the visitor economy. As consumers, Generation Z exhibit greater levels of environmental and social consciousness in comparison to older demographics[51]. From a transport perspective, Generation Z are more open to using new forms of mobility, including shared modes[52]; this is mirrored by the large decline between 1992 and 2014 in the number of people aged between 17 and 29 who hold a driving licence[53].

These more general trends have been identified and further examined in research on the visitor economy which examines future market potential. Research conducted by Welcome to Yorkshire has highlighted the importance of tapping into opportunities to attract more Generation Z visitors[54]. Generation Z are characterised by having a YOLO (you only live once) state of mind where experiences are just as, if not more important than the destination itself[54]. People in this category tend to take regular trips throughout the year which are often last minute and spontaneously booked. There is also a big focus within Gen Z around being eco-friendly and environmentally ethical, to the extent where they are willing to pay more for products or services that provide this. Lastly, the study argues Generation Z are a tech-savvy generation, who favour online bookings and personalised experiences.

The report highlights that Yorkshire has good potential to exploit this market segment as Generation Z travellers are not particularly looking for beach breaks, but instead experiences, exploration, and cultural activities. Businesses within Yorkshire and similar regions can develop offers based around these requirements as well as target social media as a means of marketing and communications by using channels like influencers or pages with heavy followings.

[50] Project Lion - Overview - For website (visitbritain.org)
[51] https://www.capgemini.com/2020/08/generation-green-is-leading-the-sustainability-agenda/
[52] https://www2.deloitte.com/content/dam/Deloitte/au/Documents/consumer-industrial-products/deloitte-au-cip-global-automotive-consumer-study-2019-110221.pdf
[53] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/673177/young-peoples-travel-whats-changed-exec-summary.pdf
[54] wty-tourism-data-march.pdf (yorkshire.com)

2.5. Transport

2.5.1. Trends and Policies

Generally, there is a reliance on private vehicle use in the North of England with approximately 75% of commuters travelling to work by car[55]. This trend also applies to visitors, particularly in rural areas such as National Parks which are a major draw for visitors. As previously discussed, around 90% of visitors to National Parks travel by car. In contrast, visitors to the North's cities are more likely to travel by public transport. A 2018 visitor survey undertaken by Marketing Manchester identifies only 21% of visitors to the city arrived by car. 64% arrived by train, while 9% arrived by bus[18].

Historically, there has often been a conflict between growth aspirations for the visitor economy, and the environmental impacts of increasing volumes of visitors arriving by private car. The Local Government Association have called for improved access to suitable transport for residents and visitors in the North and greater collaboration with Local Enterprise Partnerships (LEPs) to facilitate the conditions for growing the visitor economy. In order to achieve this, the LGA recommend greater devolution of major transport funding, joint local and national decision-making on investment in the Strategic Road Network and more influence in deciding future rail franchises and the targeting of national funds[45]. The importance of road transport for tourism has been identified by Highways England in their Roads to Growth Strategy, from the perspective of access to specific destinations and the connectivity provided by the Strategic Road Network to key international gateways[56]. However, there is a growing awareness of the environmental impacts of tourism amongst visitors and local communities, and this is boosting the demand for lower impact travel, such as public transport and active travel options for visitors, which can offer significant economic and social benefits if carefully planned and well managed.

The trend towards sustainable tourism is growing at pace, with movements such as *flygskam* (Swedish for flight shame) now having global reach and impact on consumer views and behaviours[57]. United Nations World Tourism Organisation (UNWTO) Secretary-General Zurab Pololikashvili said *"Sustainability must no longer be a niche part of tourism but the new norm for every part of our sector. That means an opportunity to build back better and create an industry that is more resilient and aligned with the UN's Sustainable Development Goals"*. But more importantly than that, there is traction from the consumer community, with TUI group reporting an 84% increase in its clients choosing "greener and fairer" holiday packages between 2015 and 2020 for instance[58]; and Booking.com highlighting that over 53% of global travellers want to travel more sustainably in the future and are willing to pay more for products that demonstrate environmental responsibility[59]. Over two thirds (69%) of respondents[58] anticipate that the travel industry will offer more sustainable travel options, and we are already seeing a growing number of eco-hotels on offer, off-setting carbon emissions of flights and volunteering in local communities while travelling to improve ecology, bio-diversity and cultural heritage[59].

With this drive to sustainability by customers, comes a response by companies and significant opportunity; dozens of hotel groups, marketing and travel companies have recently started joining the Future of Tourism coalition, which aims to "build a better tomorrow". The companies sign up to 13 guiding principles for a more ethical and planet-friendly industry including "demanding fair income distribution" and "choosing quality over quantity"[60]. As a result of the drive toward sustainable and even regenerative travel (which aims to leave a place even better than you found it), there is significant opportunity for the transport sector to tap into this consumer demand and to justify the development of more sustainable travel options. New companies such as no-fly travel company Byway founded in March 2020 have spotted the consumer consciousness trend; similar offers could be tapped into for regions like the North of England, with Innovate UK providing a £100,000 UK grant[61] there is opportunity to work in partnership with these innovative and sustainable travel companies.

2.5.2. Sustainable and Active Travel

One of the main ways to reduce the impact of visitor transport on the environment is to promote behaviour change towards the use of more sustainable active modes and public transport. A Sustainable Travel Choices User Survey, undertaken with residents, day visitors, and staying visitors to three of the UK's National Parks, including

[55] DfT Modal comparisons (TSGB01) https://www.gov.uk/government/statistical-data-sets/tsgb01-modal-comparisons
[56] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/600275/m160503_the_road_to_growth_Our_strategic_economic_growth_plan.pdf
[57] https://www.marketwatch.com/story/flygskam-is-the-swedish-travel-trend-that-could-shake-the-global-airline-industry-2019-06-20
[58] Creating a sustainable travel industry, post-Covid - Raconteur
[59] Sustainable travel statistics: 6 facts to open your mind (ehl.edu)
[60] Guiding Principles | Future of Tourism
[61] Travel start-up Byway awarded £100,000 from UK government sustainable innovation fund | Travolution

the Lake District, concluded that “the most significant triggers of behavioural change lie in more convenient, cheaper, more frequent, and accessible sustainable travel choices”[62].

The GoLakes Travel Project implemented a number of interventions, utilising Local Sustainable Transport Funding, to enable an estimated 7.8% reduction in carbon emissions from visitor travel in the Lake District National Park, a saving of 41,000 tonnes of CO_2. This was facilitated by the removal of barriers to cycling and walking by enhancing the local active travel network and increasing the availability of cycle hire, including e-bikes. Public Transport initiatives were also implemented, including the introduction of visitor bus services. Key scheme initiatives, alongside the lessons learnt, are summarised by Table 2-1.

Table 2-1 - GoLakes Travel Scheme Initiatives and Lessons Learnt[62]

Initiative	Lessons Learnt
Visitor bus services	Investment in visitor bus services provides a more sustainable alternative to the car, and an opportunity to plan routes which guide visitors towards areas with spending opportunities, therefore driving economic growth.
Cycling	Creation of more designated cycling routes and shared walking and cycling paths with the aim of creating a coherent network. Evaluation found that cycle lanes on roads could still be made safer to enable children and inexperienced riders to utilise active travel modes.
Pay-as-you-drive of ultra-low/zero emission vehicles	Using “fun” vehicles, such as the Renault Twizy, provides an element of fun which can encourage visitors who would not normally consider sustainable transport to use them as part of the ‘visitor experience’.
Hubs and Parking	By improving bus and cycle routes from railway stations, the park was able to demonstrate how travelling by car is not essential and that alternate methods could meet visitors’ needs on arrival.
Marketing and branding	The programme enhanced the image of public transport services, making services easy to identify and understand, therefore encouraging people to make trips by sustainable modes rather than by private car during their stay.

As a result of these initiatives, the percentage of visitors stating that the car was their main mode of travel while in the Lake District has decreased by 15% between 2012 and 2015, from 73% to 58%[62].

There has been a similar push in the wider region to encourage active travel, not only to reduce the impact on the environment, but also to promote healthier behaviours and habits. Lancashire County Council, Blackpool Council, and Blackburn with Darwen Council have set out an ambitious 10 year strategy to encourage cycling and walking in the region, which includes a refresh of the Cycle Lancashire brand to maximise opportunities for the visitor economy and reduce its impact on the environment. Alongside this, they are hoping to develop the ‘Walk Lancashire’ brand to promote walking routes in the region[63]. The Northumberland Cycling and Walking Board have also developed a plan to increase walking and cycling in Northumberland, which includes a focus on the county’s network of recreation and long-distance routes to establish Northumberland as “a destination for outdoor recreation”[64].

Equally, the Peak District National Park is a popular cycling holiday destination with over 100km of traffic-free trails for visitors to take advantage of. However, many of these trails were not linked together which often discouraged visitors from cycling. In 2013, the Peak District National Park submitted a bid for £5 million of funding, with £2.5 million match funding, to the DfT for the Pedal Peak Phase II project, to increase the network of routes, support cyclist friendly infrastructure, promote the Peak District cycling experience, and develop sustainable transport packages. The final project report found off road cycling schemes to be very popular, generating considerable public support. The extension of the Monsal Trail, funded by this scheme, was estimated to have generated economic benefits of at least £1.68 million for the local area[65].

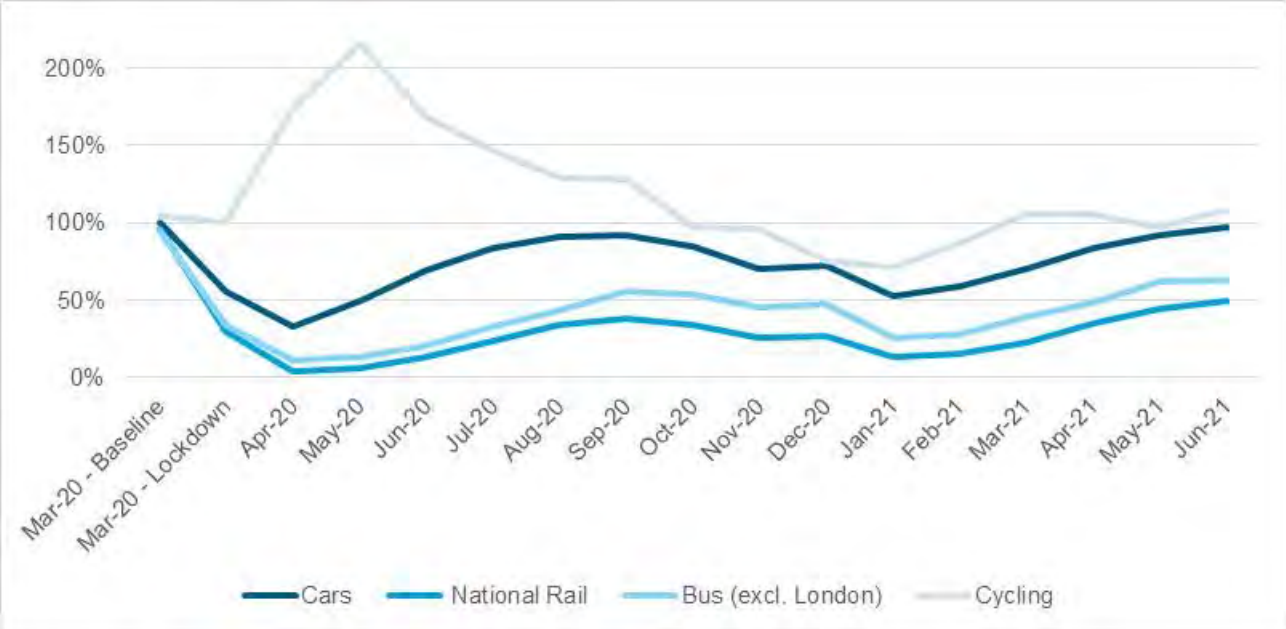
[62] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/738272/lstf-visitor-travel-case-study-final-report.pdf
[63] https://www.lancashire.gov.uk/media/917305/6469-cycling-and-walking-strategy.pdf
[64] https://www.northumberland.gov.uk/News/2020/Jun/Council-backs-ambitious-plans-to-increase-walking.aspx
[65] Pedal Peak II final project report 2013-2016 (derbyshire.gov.uk)

2.5.3. The Impact of Covid-19 on Transport Use

2.5.3.1. General Trends

To monitor the use of the transport system during the Covid-19 pandemic, the Department for Transport have been publishing statistics on transport use by mode. Figure 2-1 outlines the average monthly use of selected transport modes for journeys of all purposes during the Covid-19 pandemic. Usage figures are presented as percentages of an equivalent day or week, reported as a monthly average.

Figure 2-1 - Use of selected transport modes during the Covid-19 pandemic



Source: Transport use during the coronavirus (COVID-19) pandemic, Department for Transport

Throughout the pandemic, public transport use has been very low, in contrast to private vehicle journeys which have experienced less impact. This is in part due to fears of Covid-19 transmission reducing the perceived safety of public transport. Restrictions on public transport use have also been introduced during lockdown periods, restricting public transport services to those with an essential travel need only. However, during periods where non-essential journeys have been permitted on public transport services, use of public transport has increased much slower, to a plateau of around 50% of pre-pandemic levels. While the long-term impacts of the Covid-19 pandemic on public transport are yet to be fully established, early evidence points towards a potential decline in use of public transport services, and increased preference for private and active modes. The causes and impacts of this trend are explored in the following sections.

2.5.3.2. Rail

Use of rail services has been badly hit by the Covid-19 pandemic, causing passenger demand to fall to unprecedented levels. DfT statistics on transport usage highlight that demand for rail services fell to around 5% of pre-pandemic demand during the first UK lockdown. In response to the collapse in demand, usual rail franchise contracts were suspended, and replaced with Emergency Measures Agreements (and subsequent Emergency Recovery Measures Agreements)[66] to maintain rail services in line with lockdown restrictions. While demand recovered during Summer 2020, subsequent lockdown periods saw further declines in usage. More recently, rail usage has recovered to levels of around 40-50% of pre-pandemic levels at times, though it remains sensitive to changes in lockdown restrictions and external factors such as good weather. While overall demand may have fallen, there are emerging signs of changes to the spread of demand. Passenger Footfall Monitoring statistics from Network Rail managed stations have begun to identify a peak in demand between Thursday and Saturday.

[66] https://www.gov.uk/government/speeches/rail-update-emergency-recovery-measures-agreements

Recovery of demand is particularly strong on Saturdays, with demand recovering to as much as 60-70% of pre-pandemic levels some weeks.

During the pandemic, the profile of demand has been shaped by restrictions on leisure travel during lockdowns, and a more general government mandate to work from home where possible. However, research has identified a desire to continue with some home working following the end of restrictions, which could result in up to a 50% reduction in commuting long term. Increased home and flexible working is therefore likely to lead to demand being spread throughout the day, as opposed to pre-pandemic patterns where rail usage had two large peaks in the morning and evening, in line with the timing of most commuter journeys. While there is uncertainty surrounding the future shape and volume of commuter journeys on the rail network, leisure travel may become an increasingly important market segment. While restrictions and uncertainties surrounding international travel remain, an increase in UK domestic travel is expected; this presents a significant opportunity for the rail industry to increasingly cater for this diverse but growing market as part of their efforts to re-establish use of rail services. In the North, TransPennine Express, one of the region's primary train operators, is facing these challenges and opportunities in a number of ways[67]:

- A number of initiatives to encourage leisure journeys have been implemented, including social media campaigns supporting destinations, #TPEstayhomecation campaign, travel inspiration tips and ideas, blog posts to maintain customer engagement.
- A 3-phase marketing recovery plan has been put in place in support of these wider initiatives: Reassure (March-May 2021), Incentivise (June-September 2021), Inspire (October 2021 – March 2022)
- Post-vaccine, TPE expect that leisure demand will be 14% higher than pre-pandemic, while business travel demand is predicted to be 25% lower, and commuting demand nearly 50% lower

2.5.3.3. Coach

Similar to rail, the coach industry has been hit hard by the Covid-19 pandemic, with coach company revenues being 95% down on takings after the first national lockdown, while having to shoulder average costs of £2,000 a day while coaches lie idle[68]. 80% of coach companies are family firms[69], and important parts of local economies. Many coach companies noted that they had not received the same financial support as bus companies to cover the loss of their earnings, and have faced unclear guidance on the resumption of holidays and leisure breaks. The Confederation of Passenger Transport (CPT) (trade body for the coach and bus industry) estimates that normally around 80% of the sector's income is derived from tourism related activities, which were greatly disrupted by the pandemic. In May 2020, Shearings, a coach tour operator, went into administration causing the loss of around 2,500 jobs. The industry highlighted that "more than 24,000 people employed in the industry could be out of a job by April 2021" and that "thousands of family businesses are at risk".

There has been no specific financial support provided to the coach industry. The support provided by the UK government has focussed on support for regulated public transport services such as scheduled rail and bus services. However, the Government has provided a number of support schemes that are available to all sectors including the coach industry, such as the Coronavirus Job Retention Scheme and business loans; however the CPT identified that many businesses in the sector were unable to access the support schemes for various reasons (such as ineligibility for grants or loans)[70]. Only 20% of coach operators were able to access the support available[71].

Following the difficult lockdown periods and now with the easing of restrictions, the coach industry set out its plan in March 2021 for an ambitious recovery, including grants to help tours get underway and kickstart the UK tourism economy[72]. With restrictions easing, and a likelihood of an increase to the staycation market due to continuing restrictions on overseas travel, coach tourism can restart this summer, giving the industry an opportunity to play a leading role in the UK's economic recovery. Coach travel can help to meet the transport needs of visitors while relieving congestion pressures on tourist hotspots, as well as supporting the Government's net zero plans (a 15% increase in coach travel would mean 47 million fewer cars on UK roads, reducing carbon dioxide emissions by over a quarter of a million tonnes)[72]. The coach industry has asked for a £100-150m grant to support operators to get up and running while social distancing and reduced capacity is in place, and have asked for Government backed campaigns to promote coach travel to passengers and locations[72].

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[67] TransPennine Express reCONNECT 2021 seminar, May 2021
[68] Coronavirus: Coach convoy highlights impact on industry - BBC News
[69] coach strategy stakeholder A4 (cpt-uk.org)
[70] Future of the coach industry (parliament.uk)
[71] coach strategy stakeholder A4 (cpt-uk.org)
[72] Coach industry sets out Covid-19 recovery plan | CPT (cpt-uk.org)

2.5.3.4. Bus

Like other forms of public transport, bus service patronage has been severely hit by the impacts of the Covid-19 pandemic. In April 2020, during the first national lockdown, patronage of bus services fell to around 10% of pre-pandemic levels, causing many operators to remove more than half of their bus fleets from service[70]. As with other forms of public transport, social distancing guidelines led to reduced passenger capacity and advice to avoid unnecessary travel resulted in reduced demand for public transport[73]. While Figure 2-1 identifies bus services have been impacted slightly less severely, and recovered slightly faster, than rail services, overall usage remains at only 60% of pre-pandemic levels. During the pandemic, to support the maintenance of essential services, and now to aid the recovery and restart of services, government funding has been made available to support commercial bus operators who would otherwise have been unable to continue running services[74]. In line with the relaxation of restrictions, some operators have sought to implement promotional initiatives to support the return to town centres and public transport. This includes 'Sunday Freeway' by The Harrogate Bus Company, sponsored by Harrogate BID, which provides free bus travel into Harrogate on Sundays on a network of electric buses operating in the town[75].

2.5.3.5. Active Travel

Unlike other modes, active travel saw a significant boost during the Covid-19 pandemic, especially during the first national lockdown, where levels of cycling and walking peaked at over 200% of pre-pandemic levels as people avoided public transport and took advantage of quieter roads and generally good weather. In response to the unprecedented levels of walking and cycling, the government provided a £250 million emergency active travel fund to support the creation of pop-up bike lanes with protected space for cycling, wider pavements to encourage walking and aid social distancing, safer junctions, and cycle and bus-only corridors[76]. While the popularity of active travel fell during lockdowns over winter months, the National Travel Attitudes Study found that over 90% of those who had travelled by active modes during the pandemic would continue to do so following the lifting of travel restrictions and social distancing measures[77].

2.5.3.6. Perceived Safety

Transport Focus have found that while most users of public transport during the pandemic felt safe, less than half of people who have not used public transport during this period would feel safe if they made a journey[78]. This indicates that there is a gap between the broader perception of public transport, and the experiences of those who have used public transport during the pandemic. Potentially, once people are encouraged to use public transport again, they are likely to feel that the measures transport operators have put in place will keep them safe. The extent to which this is possible however is dependent on the compliance of passengers with the social distancing and cleanliness guidelines put in place by operators. Without widespread compliance, some customers may not feel confident to return to public transport.

However, evidence suggests there may have been a shift in people's attitudes towards public transport more generally, and that it may require significant effort to overcome this and prevent an increase in less sustainable travel behaviours as we emerge from lockdown restrictions. This shift has been noted by Transport Focus, whose research has found that one in three people agreed that even after the risk of Covid-19 is reduced, they will drive for journeys that they would have previously completed using public transport, as they find it to be a more flexible and socially distanced mode of travel [79] [80]. The National Travel Attitudes Study has also identified continued concerns regarding crowding on public transport services, with two thirds of those surveyed stating once restrictions are lifted, they will avoid using public transport services if they are crowded[77]. Additionally, a recent YouGov poll has identified 71% of people in England, Wales and Scotland think face masks should continue to be mandatory on public transport for a further period of time[81]. It is likely that it will take time for these negative

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73 https://www.smmt.co.uk/2020/10/call-for-vital-investment-in-bus-and-coach-industry/
74 https://www.gov.uk/guidance/apply-for-the-covid-19-bus-service-support-grant
75 https://www.harrogate-news.co.uk/2020/12/05/free-sunday-buses-for-harrogate/
76 https://www.gov.uk/government/news/2-billion-package-to-create-new-era-for-cycling-and-walking
77 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/956170/national-travel-attitudes-study-wave-4-final.pdf
78 https://d3cez36w5wymxj.cloudfront.net/wp-content/uploads/2021/01/26170211/Travel-during-Covid-19-key-lessons-for-2021-and-beyond.pdf
79 https://d3cez36w5wymxj.cloudfront.net/wp-content/uploads/2020/08/27174237/Transport-User-Community-rail-leisure-travel-and-urban-travel.pdf
80 https://d3cez36w5wymxj.cloudfront.net/wp-content/uploads/2021/01/26170211/Travel-during-Covid-19-key-lessons-for-2021-and-beyond.pdf
81 https://yougov.co.uk/topics/health/survey-results/daily/2021/07/05/0275c/1

perceptions of the safety of public transport to dissipate, even after government restrictions begin to ease, and initiatives to encourage the use of public transport once more may be necessary.

2.5.3.7. Changes to Travel Patterns

Alongside changes to the perception of public transport, people may no longer have such a need to travel, as for many where we work, and how often we commute, has changed significantly. It is acknowledged that existing trends, for example lower levels of commuting, have been accelerated by the pandemic, and it is unclear how or whether demand for some types of journeys will rebound[82]. Research has identified that of those who previously commuted by train before the pandemic, around two in three people expect to work from home more often in the future[83]. There may also be a shift away from set working times as people have become more accepting of flexible working practices. This would have the effect of further flattening morning and evening peak travel demand, potentially generating higher demand during traditional ‘off-peak’ periods. As outlined previously, work by TfN to understand potential future travel demand trends has identified that while commuting journeys may decline, there is a strong possibility that demand for other journey purposes will grow significantly, with the potential for rail in particular to capture a large share of this projected growth[82].

Atkins completed work in 2020 as part of the MaaS4EU consortium project (an EU funded transport project) in response to the Covid-19 pandemic, which focussed on understanding how the behaviours of Greater Manchester residents had changed since the emergence of Covid-19, and provided recommendations for Transport for Greater Manchester (TfGM) to improve and evolve transport services in the long term. As part of this work, a set of ‘Covid-19 Travel Personas’ were created to represent the typical travel journeys and travel attitudes of residents of Greater Manchester during the time of the pandemic. From this persona research and development (full list and detail of personas can be found in Appendix A.1), it was found that Covid-19 had led to different behavioural changes for different persona groups:

- The personas reflected a need to change travel behaviours during the Covid-19 pandemic, either significantly or in more nuanced ways, in response to travelling only for essential journeys or in order to feel safer when travelling.
- Several personas had swapped using public transport for either a private car or active travel journeys – therefore the Covid-19 pandemic could be seen to be having both a positive and negative impact on travel behaviours, and a significant impact on modal choice.
- Safety concerns relating to Covid-19 were the primary reason for this change in behaviour.
- Several personas will continue with their new travel habits long-term as they have enjoyed their experiences and have become used to a new mode choice/travel pattern. This poses both an opportunity and a risk for public transport services long-term in Greater Manchester, and likely other Northern cities.
- One of the Covid-19 travel personas ‘Public Transport Reliant with Complex Needs’ has benefited from quieter public transport services during the Covid-19 pandemic as they feel more empowered to travel knowing they will get a disabled seat and won’t have to contend with congested services. This group is more likely to travel by public transport and make more journeys overall post Covid-19.
- All of the personas wanted to make an increased number of leisure trips, particularly trips to see friends and family within the UK, once lockdown restrictions were eased, but private car was the default mode for future journey plans due to continued perceived ‘safety’ benefits even once the pandemic is over. This demonstrates a risk of a spike in car usage for visitor economy journeys in the North.

2.5.3.8. Post Covid-19 Public Transport Recovery

To help public transport demand recover after lockdown, it is important that customers feel safe during their journey. As mentioned above, those that have used public transport through the pandemic have felt safe, reporting that the key aspects of a safe journey include the ability to keep a safe distance from other passengers, the number of people wearing face coverings, and the behaviour of other passengers[84]. Driving compliance with the rules, maintaining improved cleanliness, and continuing to provide capacity information to users will help to ensure that a feeling of safety is promoted and subsequently sustained, thus encouraging public transport use.

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[82] https://transportforthenorth.com/wp-content/uploads/TfN_Future_Scenarios_Report_FULL_FINAL_V2.pdf
[83] https://d3cez36w5wymxj.cloudfront.net/wp-content/uploads/2021/01/26170211/Travel-during-Covid-19-key-lessons-for-2021-and-beyond.pdf
[84] https://d3cez36w5wymxj.cloudfront.net/wp-content/uploads/2021/01/07162302/Perceptions-of-safety-on-public-transport-key-drivers-analysis.pdf

Some transport operators are however facing an existential challenge as a result of restrictions and supressed travel demand resulting from the Covid-19 pandemic. While some transport operators, such as the UK's franchised Train Operating Companies (TOCs)[85], have received significant government support to ensure services continue to run, commercially operated services have faced considerable challenges. This includes the cancellation of planned 'open access' rail services between Blackpool and London by Grand Central[86]. The UK's coach sector has faced similarly bleak prospects, with some businesses experiencing a greater than 90% drop in income during 2020[87].

2.6. Economics, Employment and Skills

2.6.1. Context

The UK's visitor economy generates £126.9 billion and 9% of UK GDP annually, with potential for future growth (post Covid-19 and Brexit impacts) which will enable the sector to contribute to the delivery of political priorities such as increasing employment and improving skills opportunities[88]. The LGA highlights that Councils and local leaders are playing a key role in capitalising on the growth potential of local Visitor Economies by creating the right conditions for the sector to grow and thrive, and also by facilitating a rich cultural offer to attract visitors to key destinations. The LGA also highlights the opportunities to further drive growth through increased productivity, and visitor spend[89].

2.6.2. Productivity Challenge

Most of the future growth potential of the visitor economy is expected to lie in higher productivity. Traditional measures to improve productivity focus on supply side interventions such as better service quality or improved sector diversity. However, with regards to tourism, productivity variations in demand are one of the biggest influences. Changes in numbers of visits, and also in visitor spend, are both variations in demand[90]. Demand side productivity measures could include converting day visits into overnight visits, increasing the duration of overnight stays, attracting more business tourism, and securing repeat "staycation" visits even once the economy recovers. However, this can be a challenge as the visitor economy is largely composed of small businesses (over 70% are microbusinesses and a further 25% are SMEs). These businesses are less likely to engage in training to attract new customers, often don't have large reserves of funds for capital spend that can drive growth, and often have a desire for stability rather than growth which lies behind the productivity problem in the sector[88].

2.6.3. Skills and Employment

The visitor economy offers solutions for the broader economy and an opportunity to address the productivity challenge throughout the UK, including via employment opportunities. The sector directly employs 9.5% of the UK workforce[88], with many of these jobs being entry level or part time jobs, offering much needed opportunities for 16-24 year olds not in employment, education or training (NEETS) and parents of young children looking to return to work[89]. The visitor sector not only makes a direct contribution to local economies but also provides an invaluable indirect economic impact through supporting businesses in the supply chain. Previous research has identified that one in twelve jobs in the UK is either directly or indirectly supported by tourism[91].

However, it is highlighted that the hospitality sector has the highest percentage of skills gaps nationally. Local businesses continue to face challenges in attracting and retaining talent, which is related to real and/or perceived low pay, high turnover of staff, long shifts and seasonality. The structure of the sector, particularly as it is dominated by SMEs, means that many do not have the HR infrastructure to support workforce development. Low pay and seasonality of work, real and perceived, are key issues that prevent tourism and hospitality being regarded as a long-term career option for young people[88].

Research undertaken by Craven College, the Yorkshire Dales National Park Authority, and North York Moors National Park Authority, explored the training needs of the visitor economy sector through the LEP area of

[85] https://www.gov.uk/government/speeches/rail-emergency-measures-during-the-covid-19-pandemic
[86] https://www.grandcentralrail.com/news/2020/grand-centrals-planned-blackpool-london-route-falls-victim-covid-19
[87] CPT Briefing: Future of the coach industry, provided by project stakeholder
[88] Supplying skills for the local visitor economy
[89] visitor-economy-potential-f2a.pdf (local.gov.uk)
[90] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/tourism_productivity_gap_october_2019.pdf
[91] how_important_is_tourism_in_the_uks_economy.pdf (weebly.com)

York, North Yorkshire and East Riding District[92]. The key findings were that the most frequent requests for the training needs of businesses were for:

- Improving customer service
- Use of social media
- Leadership and management training
- Marketing
- 'Sense of place' training

Following these findings, Tyro Training (the commercial training division of Craven College) delivered training to 183 staff on all of the above topics. The 'Sense of place' training was developed in conjunction with Scarborough Borough Council and Welcome to Yorkshire to produce a 'Discover Yorkshire Coast' Champions training scheme. The report recommended that continued investment was required in the five training areas outlined above to ensure excellence and drive economic growth in the visitor economy.

The LGA and local councils have called for an integrated, effective and locally responsive employment and skills system to meet the labour market and skills challenges of the future – very much a 'Work Local' approach. The context for its work is the UK's centralised employment and skills system, which focuses on a top-down approach offering little flexibility. The LGA highlight the system as fragmented, with seventeen funding streams managed by eight departments or agencies responsible for expenditure of more than £10bn a year. The centralised system is said to be insufficiently responsive to the needs of local economies and is an important consideration for the visitor economy in the North of England. The 'Work Local' agenda is not just about joining up budgets, but also about joining up services to deliver a more coherent and personalised experience to visitors[88].

[92] CC-Supporting-VE-Business-Growth.pdf (businessinspiredgrowth.com)

Examples of Visitor Economy Business Support in the North[89]

Cheshire East, Cheshire West, Chester and Warrington Councils - Case Study

Cheshire East, Cheshire West and Chester and Warrington Borough Councils have been working in partnership with local SMEs and destination management organisation *Marketing Cheshire*, to develop a local food brand for the region through Tourism Connect and Food Connects project.

Tourism Connect aims to increase the competitiveness and productivity of the tourism industry in the rural areas of Cheshire. It plans to improve accommodation and conference facilities, raising awareness of local food procurement. Over 18 months, the project supported 13 businesses; and from £650,000 of grants, over £1m of private sector investment was made, creating 18 jobs and increasing overnight visitors by 3.6%.

Food Connect aims to increase the competitiveness and productivity of the food tourism sector through improved marketing of local food businesses.

Calderdale Council - Case Study

The majority of Calderdale Council's tourism offer is delivered by small and medium sized businesses (SMEs) such as bed and breakfasts, restaurants, and local attractions.

The Council support more than 50 tourism SMEs directly through one-to-one advice over the phone or face-to-face. This ranges from advice on setting up a business, marketing services to other formal quality assessment support. The Council also run regional training sessions, for example one training session was delivered to businesses outlining the results of the regional visitor survey.

The Council has also rolled out an ambassadorship training programme, catering for up to 200 taxi drivers and acknowledging that they are often the first or last people to meet visitors and therefore play a crucial role in the "visitor welcome". This will equip drivers with skills and knowledge on offering a friendly welcome and promoting the local area's attractions, information sources and events. The aim is to encourage repeat visits, recommendations and higher spend in the area.

2.6.4. Post-Covid recovery of the Visitor Economy

In May 2021, VisitBritain estimated that as a result of the ongoing Covid-19 pandemic, during 2021 domestic visitor spend would be 56% lower than pre-pandemic levels, while inbound tourism spend will be just 22% of pre-pandemic levels[93]. However, there is the potential for some bounce-back from the domestic visitor market once lockdown restrictions ease. This is good news for places like Blackpool, which are much more dependent on domestic tourism; while larger cities such as London, Manchester, Birmingham and Glasgow are more reliant on overseas tourism and are therefore likely to experience a slower level of recovery[94]. It is expected that cities and destinations most reliant on leisure tourism will benefit most from the post-lockdown reopening, as business tourism is likely to rebound more slowly than leisure tourism due to trends for more home-working and virtual meetings[94]. International tourism to the UK is expected to recover at a slower rate than domestic tourism due to ongoing border restrictions, concerns regarding new Covid-19 variants, the economic climate within each market, and new behavioural habits formed as a result of the pandemic[93].

Given that UK nationals might be less likely to go abroad, domestic tourism is expected to grow[94]. In terms of future trends and opportunities for recovery, the findings of the Lancashire Consumer Perceptions and Attitudes Covid-19 Safe Recovery Survey conducted in June 2020[95] are relevant. This survey highlights that the top activities people are most likely to do once lockdown restrictions ease are:

- Going for a day trip to an outdoor location (62%)
- Going for a day out to the coast (57%)
- Going to a restaurant (47%)
- Going to a pub (34%)

This illustrates that the sectors of the visitor economy which are likely to be unlocked most quickly, such as trips to outdoor/rural locations and the coast, will meet people's needs and therefore release pent up demand. For urban places which historically benefit from business tourism, such as Liverpool, Manchester, Leeds, or Sheffield, visitor numbers may take longer to recover, and in the shorter term the local economies of these cities are more at risk from suffering a loss in revenue normally generated by high-spend business tourism[94].

While the Coronavirus pandemic and Brexit have posed challenges to the North's visitor economy, there are also many potential opportunities which are likely to play a key role in economic recovery. For example, the 'Build, Build, Build' and 'Levelling Up' agendas are set to fast-track key transport infrastructure projects such as HS2 and Northern Powerhouse Rail, both of which will significantly reduce travel times to, from and within the North. These schemes will also increase the catchment area of many of the North's key visitor destinations and cities, which will be of particular benefit to day visitors and drive the growth of sustainable modes within the visitor economy.

[93] https://www.visitbritain.org/2021-tourism-forecast#:~:text=VisitBritain's%20forecast%20for%20inbound%20tourism,and%20%C2%A324.2%20billion%20spending.
[94] Too much of a good thing: the role of UK tourism in a post-Covid world | Centre for Cities
[95] Lancashire Consumer Perceptions and Attitudes Covid-19 Safe Recovery Survey supplied by project Steering Group member

2.7. Conclusions

- This literature review has examined a range of existing documents on the visitor economy of Great Britain and the North of England. The visitor economy has been identified as an important segment of the UK economy, directly and indirectly supporting significant volumes of employment. However, the sector has faced substantial challenges as a result of the Covid-19 pandemic, which has led to its effective closure for a significant part of the last 12 months.
- There are a number of opportunities on the horizon for the sector which could provide significant benefits. Following the 2008 financial crisis and subsequent recession, levels of domestic tourism increased as people sought leisure and tourism opportunities more in line with prevailing economic and social conditions. A similar set of conditions are now present within the Covid-19 context, but with added health uncertainty and increased environmental awareness. With international travel likely to be constrained over the coming years, it is likely there will be increased demand for short breaks in the UK, an opportunity the North should look to seize.
- Increasing environmental awareness among certain visitor demographics, and emerging global movements such as *Flygskam* (flight shame) will continue to reshape the sector. These shifts and developments could create pressures for the North's public transport services and road networks which should be anticipated and addressed ahead of time.
- The visitor economy can potentially mitigate the environmental effects of a significant increase in 'staycations' by seizing upon shifts in personal mobility which have occurred since the emergence of the Covid-19 pandemic, such as increases in cycle use and the growth of the e-bike market. Studies have shown visitors are open to utilising active and sustainable modes while on holiday, provided this is easily facilitated. For certain demographics, the availability of unusual or innovative transport modes and services is a significant attraction in itself; therefore, there is an opportunity for the North's visitor economy to become more sustainable while also diversifying the customer base.
- While links between some cities, regions and major airports in the North are good, overall pan-Northern connectivity can be poor; this is particularly the case in rural areas where most visitors travel by car. Improving the connectivity of harder to reach areas, through improved public transport options within these areas, will improve the experience of visitors by allowing them to get around more easily, without need of a private vehicle.

3. Visitor Economy Profile

3.1. Methodology

The following sections estimate both the size and value of the North's visitor economy, at Local Authority level and upwards, through primarily utilising key economic and visitor data, key spatial information, and where appropriate, integrating relevant literature insights. A central analysis has been undertaken using a consistent set of secondary data sources to facilitate benchmarking of the North's visitor economy. Alongside this core analysis, there are inserts throughout the report (indicated by a coloured outline) which explore the North's visitor economy in further detail. These inserts utilise a range of data sources, including Local Data provided by the project Steering Group and other stakeholders. Consequently, comparisons made using these inserts and the main narrative should be made with caution, as the data sources may not be comparable.

The primary stage of analysis looks to understand the size of the North's visitor economy, this analysis of the key data has been undertaken in two parts, supply side and demand side analysis.

The supply side analysis utilises the following data to develop the core analysis of the size of supply for the North's visitor economy:

- Employment in visitor economy sector at Local Authority level, sourced from NOMIS Business Register and Employment Survey data set (2019),
- Business numbers in visitor economy sector at Local Authority level, sourced from NOMIS Business Counts data set (2019),
- Additional non-core data to inform the supply side analysis includes:
  - Total Accommodation Stock: Establishment Type, rooms and beds, sourced from Visit Britain Great Britain Tourism Survey (2016)
  - All UK visitor attractions and charge bands, sourced from Visit Britain Great Britain Tourism Survey (2018)

The demand side analysis utilises the following data to develop the core analysis of the size of demand for the North's visitor economy

- Domestic overnight visitor numbers, Visit Britain Great Britain Tourism Survey (2019)
- International overnight visitor numbers, sourced from ONS's International Passenger Survey (2019)
- Volume of international Tourism Day Visits and expenditure by English Local Authority
- Volume of domestic Tourism Day Visits and expenditure by English Local Authority, Visit Britain, GBTS Domestic day tourism by residents of Great Britain, 2019
- Additional non-core data to inform the demand side analysis include:
  - Visit numbers to attractions, sourced from Visit Britain Great Britain Tourism Survey (2018)
  - Visit seasonality analysis undertaken by Rand Europe for TfN's Visitor Economy Modelling and Appraisal commission

STEAM models, and similar data on place specific visitor analysis such as the Cambridge Model, have been analysed for specific locations to provide a further layer of analysis and to test the central analysis. This analysis has been presented separately from the central analysis in the form of case study inserts which cover specific places.

The method used by STEAM and the Cambridge Model varies significantly from the method used in this report. The STEAM methodology report states that the model utilises different local data for indicators of supply, with the model being built up from this basic information by drawing on data from published or unpublished sources, local interviews, and supplementary trade enquiries[96]. Examples of the data used by STEAM models includes local accommodation occupancy rates, local bed stock data, local data on attendance to attractions and events, and carpark use. The STEAM method does not aim to provide a precise and accurate measurement of tourism in a local area, but rather aims to provide an indicative base for monitoring trends. Additionally, a number of coastal resorts in the North have moved away from using STEAM, and now use the Cambridge Model, an alternative technique for estimating the impact of tourism within a locality. Availability of STEAM or Cambridge

[96] Global Tourism Solutions, Overview of STEAM, 2009

model data also varies across the North, with some local authorities, destination management organisations, and national park authorities refreshing the data annually, whereas other bodies undertake less frequent updates. As a result of the difference in method, data sources, and the purpose of STEAM data, we have reported only on trends identified from STEAM data and reports.

The secondary stage of analysis looks to understand the value of the North's visitor economy

The analysis of the value of the North's visitor economy will build on the outputs of stage one. In light of the data available, two methods have been used to calculate a range of potential values for the North's visitor economy. Both of these values will be presented in GVA terms to allow for comparison and a range of value outputs.

Supply side - The first method utilised to calculate the value of the North's visitor economy is a translation of employment to GVA using a GVA per worker approach.

Demand side - The second method utilised to calculate the value of the North's visitor economy is turnover to GVA approach, using total visitor spend data.

Consideration is also made to additionality and multiplier effects, recognising where there may be leakage of value from the North's economy and where visitor spend will also translate into a supply-chain value for the economy.

Indirect multiplier impacts are those that occur along the supply chain linkages, resulting from activity and expenditure in the sector.

Induced multiplier impacts are those associated with expenditure that results from those who derive their incomes from the direct and supply linkages of the sector, such as employee salaries and business owner compensation[97].

Leakage regards the proportion of outputs that benefit those outside of the target area or group.

Displacement regards the proportion of outputs accounted for by reduced outputs elsewhere in the area. For example, a job which hires construction workers who would have otherwise been hired on another project.

Substitution has not been deemed to be relevant for this assessment, as this refers to the impact of public sector assistance on activity levels.

The methodology for the value of the visitor economy is set out in more detail in Section 4.1.

Visitor sector Standard Industrial Classification (SIC) definitions

Some of the supply side data used in this report can be broken down by sector, including business numbers, employment numbers and GVA. The data is available at different SIC levels including to the 5-digit subclass level. The visitor economy is not an official sector in these data, instead the analysis identifies and groups together different SIC codes to try and best represent the visitor economy sectors. A list of the SIC codes used as part of the analysis can be found in Appendix B.1. As not all of the activity recorded by each SIC code results from the visitor economy, using expert judgment, high level percentages have been assigned to each SIC code to estimate the share of the SIC that is attributable to the visitor economy.

Whilst acknowledging that it is unlikely that exactly 50% of the activity of taxi operations for example is a result of the visitor economy, assigning high level percentages to each of the SIC codes provides more helpful insights into the visitor economy than assuming 100% of all the SICs are attributable to the visitor economy.

Upper and lower scenario percentages have been assumed for each SIC to provide a range of values on the scale of the supply of the visitor economy of the North of England, these are detailed in Appendix B.1.

The upper scenario is presented through the majority of the report, while in places the lower scenario is acknowledged and discussed. There are limitations to the accuracy of this sector coverage; however given the scope of this report it provides a helpful indication of the visitor economy and its sectors, and seeks to avoid over-estimation whilst acknowledging the breadth of the visitor economy. This is a similar approach to that used by the ONS for their Tourism Satellite Account, where the ONS explain the limitations of applying percentages to estimate the share of economic activity attributable to the visitor economy.[98]

The SIC code definition of the visitor economy used in this report was agreed at the outset of this study. The central analysis for the visitor economy profile and value does not include retail or scheduled passenger air transport. Including these in the estimate for business and employment numbers runs the risk of significantly

[97] HCA, Additionality Guide Fourth Edition, 2014
[98] ONS UK Tourism Satellite Account methodology guide, 2017

skewing the data and overestimating the size of the visitor economy; these sectors are large in terms of business and employment numbers, but only part of their total size represents activity related to the visitor economy, whilst the retail sector is not disaggregated into lower SIC levels that can be identified as being more or less relevant to the visitor economy. Consequently, the supply side data presented in this study may vary from data used at a local level due to different SIC definitions of the visitor economy used by some local areas. Previous research that looks to estimate the visitor economy chooses to exclude these sectors for assessing the visitor economy including that conducted by Deloitte and Oxford Economics, and Merseyside and TfN[99,100]. Whilst these sectors are not included in the central analysis of this study, the retail sector is recognised as a central activity to the North's visitor economy and therefore analysis has been included in section 3.2.4 of the report using both quantitative and qualitative analysis.

3.1.1. Data Limitations

The following are the main limitations of the data:

- International/inbound day visitor data was only made available for the top 60 towns in the UK
- Data detailing the purpose of trips was limited across most of the visitor data sets. Where data was limited, information at the regional level from relevant reports was used.
- A number of datasets from multiple sources have been used in this study. Where possible, data was obtained, processed and presented at local authority level to provide as much granularity as possible. However, some data, including that on international visitors, was only available at county/combined authority level. Additionally, some data on individual towns or cities has been included within the central analysis. Where used, this data was aggregated to local authority level for mapping and presentational purposes.
- All visit data was available for number of visits, except the international day visitor data which has been presented for visitor numbers, as opposed to visit numbers.
- Across all the visit data the lower the level of geography observed, the higher the sampling error.
- Most, but not all visitor spend has been captured in the available data. As the direct demand side GVA calculation is based on this spend data it also estimates most, but not all of the GVA impacts of the visitor economy in the North.
- The lowest level the GVA and Turnover data was available at was at the regional level which limited the geographical level of the GVA to turnover ratio calculation.
- The Peak District National Park straddles a number of Local Authority boundaries, some but not all of which are part of the TfN area. In order to best capture the demand and economic activity generated by visits to the Peak District, three local authorities outside the North of England (Staffordshire Moorlands, High Peak and Derbyshire Dales) have been included in the overall analysis of the North's visitor economy in recognition of the contribution made by the Peak District National Park to the North's overall visitor offer.
- Regional level figures presented throughout the report may not sum to the equivalent pan-Northern figures provided due to rounding and study area geography

3.1.2. Key Definitions of indicators in the report

Abbreviation/Reference	Definition
GVA	Gross Value Added has been used in this report to represent the measure of total economic output in the visitor economy in monetary terms.
Attributable GVA	Attributable GVA is the share of GVA which is attributable to the workforce, this is the numerator for the calculation of GVA per Workforce Job. Attributable GVA is calculated using the ONS Regional GVA (income approach) data which provides GVA subcomponents: Compensation of employees (CoE), Taxes, Subsidies and Rental Income. Attributable GVA includes: CoE + (GOS/MI – rental income) + (Proportion of rental income to GVA * taxes less subsidies)

[99] Deloitte and Oxford Economics, Tourism, jobs and growth - The economic contribution of the tourism economy in the UK, 2013
[100] TFN, visitor economy and Transport Demand in the North of England, 2018

Abbreviation/Reference	Definition
Domestic day visit/visitor	According to The Great Britain Day Visitor Report, Tourism Day Visits are a sub-set of 3 hours+ Leisure Day Visits, where the trip is not taken regularly, and the destination is different from the place the visitor lives.
International day visitors	Foreign resident respondents who spent at least one night in the UK and spent at least 1 hour in a daytrip destination.
Other towns	In the Visit Britain international overnight data other towns are those where the visitor was unable to give the name of a town but usually was able to give the county name. Other towns are small towns / villages not listed and grouped by county instead. Individually these towns would see lower visits than the larger towns specified, but when grouped they account for higher numbers.
North of England	In the context of this report, the North of England is defined by the local authorities represented on TfN's partnership board, plus the local authorities which comprise the majority of the Peak District (High Peak, Derbyshire Dales, and Staffordshire Moorlands), noting the importance of the Peak District as a visitor attractor straddling the border of the North and Midlands.

3.2. Supply side

The supply side analysis of the size of the North's visitor economy looks to depict what assets the North has to offer to visitors. The following section summarises the central analysis that looks to indicate the size of the North's visitor offering using data on employment and businesses in the sector. This analysis does not provide a final figure to indicate the size of the visitor economy, instead it presents a range of values for the size of the North's visitor economy to indicate the scale of the sector from different perspectives.

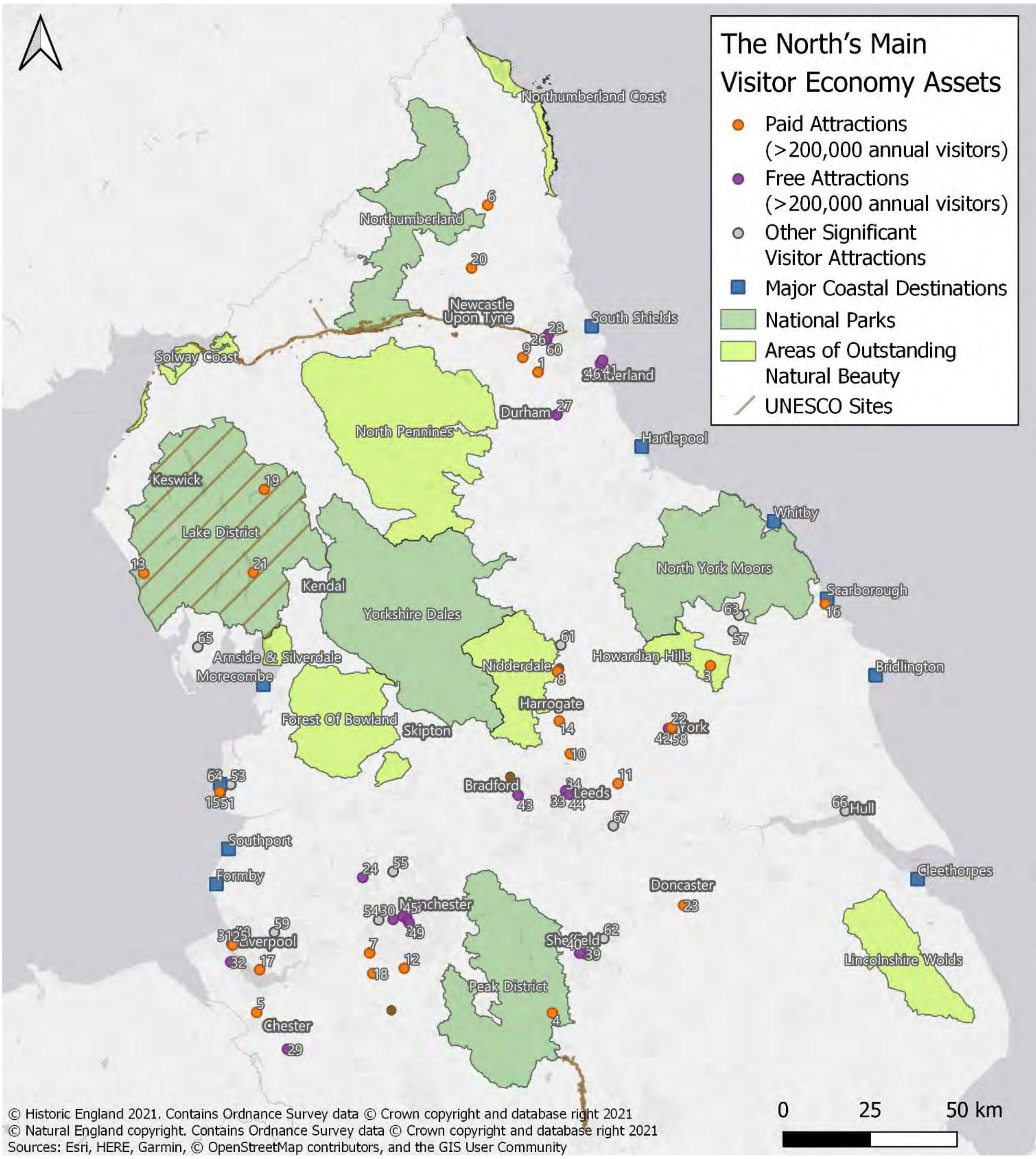
Beyond this central analysis additional data and information has been analysed to present a broader picture of the North's visitor offering.

Figure 3-1 summarises the North's largest visitor economy assets, including National Parks and Areas of Outstanding Natural Beauty. The North is home to the largest share of the UK's National Park land, including the Lake District, Northumberland, North York Moors, the Peak District, and Yorkshire Dales. These are important assets for lifestyle and wellbeing of residents as well as being key visitor attractions. The North is rich with a large array of natural, historical and leisure assets, including:

- Five national parks
- Six areas of outstanding natural beauty
- Over sixty national nature reserves
- Six National Trails
- Museums of national importance (such as the Tate Liverpool, BALTIC Centre in Gateshead)
- Eight UNESCO World Heritage sites (such as Hadrian's wall)
- Heritage cities and towns (e.g. York, Chester, Durham)
- Large sport facilities
- Facilities known for the hosting of national and international events
- Large retail centres with varied offerings (In 2019, 10 retail centres in the North of England ranked in the top 50 retail centres in the UK on the Vitality index)

Figure 3-1 outlines a range of the North's main built and natural assets. For clarity, the key visitor attractions have been numbered. A full list of the features identified by attraction type is provided in Appendix B.2.

Figure 3-1 – The North's Main Visitor Economy Assets



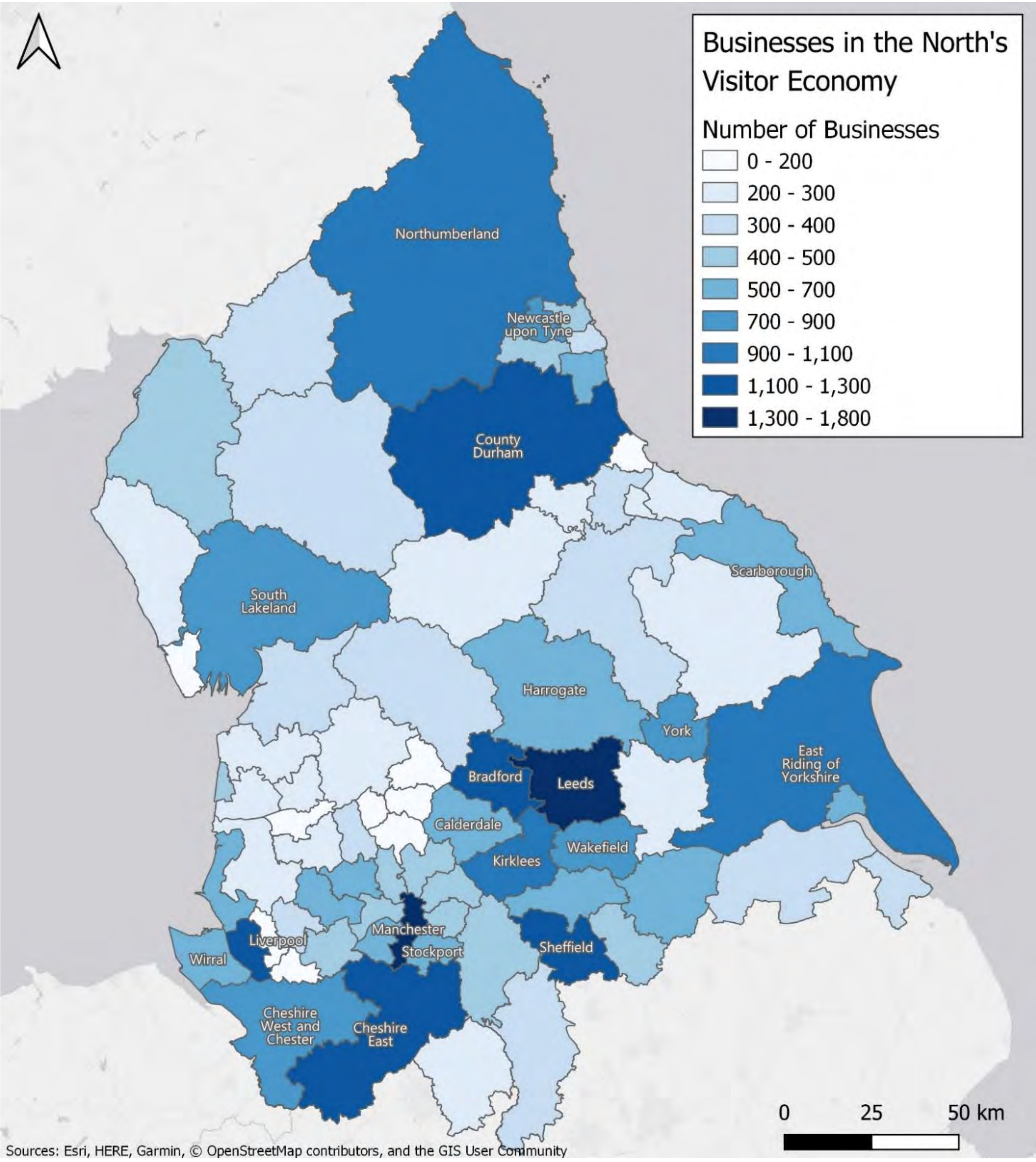
Note: At the time of this study (January – July 2021), Liverpool – Maritime Mercantile City remained designated as a UNESCO World Heritage Site

3.2.1. Businesses

Data on the number of businesses in sectors that capture the visitor economy has been collected at the regional and Local Authority level for the North of England. Table B.3.2 summarises this data where it shows the number of businesses by region in the North and broad industrial group. These figures on business numbers refer to the businesses which are directly associated with the visitor sector. In addition, the visitor economy sector supports a large number of other businesses indirectly through its supply chain.

There are roughly 39,000 businesses in the visitor sector across the North. The largest share of businesses are in the North West of England (46%), and Yorkshire and Humber (36%), with 16% of the businesses falling within the North East of England.

Figure 3-2 - Businesses in the visitor sector by local authority



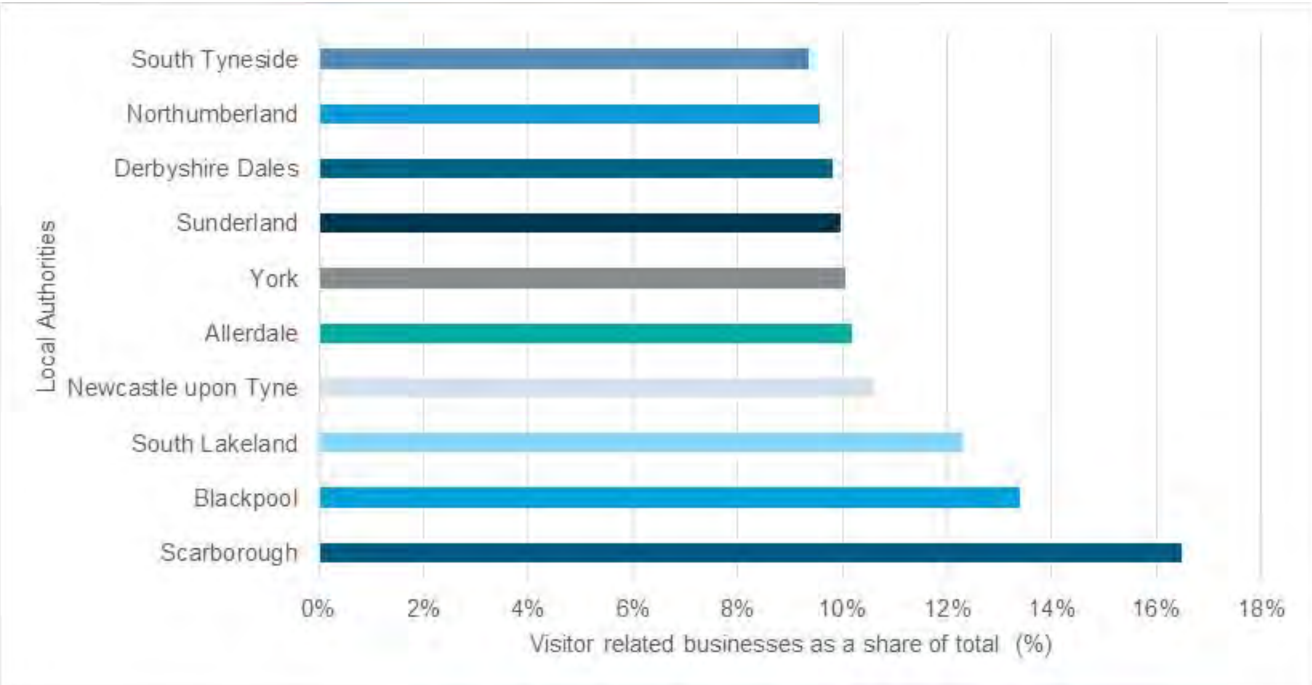
Source: Nomis, Business Counts, 2019

Figure 3-2 summarises the local authorities in the North with the highest numbers of businesses in the visitor sector. The local authorities of Leeds (1,800), Manchester (1,700), Sheffield (1,300), and Liverpool (1,300) have the largest number of visitor related businesses; these local authorities are some of the main economic centres of the North of England and home to some of the UKs largest cities and therefore have high business numbers across all sectors. The North's cities are important to its visitor economy; cities such as Leeds, Manchester, Sheffield and Liverpool provide a high-quality visitor offer and access to a great range of amenities. Cities are able to sustain more specialist and premium amenities, partly as a result of the comparatively higher spending power of their residents and workers, making them an attractive visitor destination[101]. Section 2.2.2.2.3 details the varied offering of the North's cities, which enables them to capture a wide range of visitors. For example, most cities have a wide-ranging offering of food and beverage/accommodation options, culture and heritage options, and conference and exhibition provision, therefore attracting a wide demographic of visitors.

County Durham, Cheshire East and Bradford also have over 1,000 businesses in the sector. More detailed data on the number of businesses by sector and Local Authority can be found in Appendix B.2.

The Borough of Scarborough has the highest proportion of visitor related businesses of the local authorities in the North, with 16% of all businesses in the borough being visitor related businesses. As outlined by Figure 3-3, the local authorities of Blackpool (13%), South Lakeland (12%) and Newcastle upon Tyne (11%) also have a high proportion of visitor related businesses.

Figure 3-3 – Top 10 local authorities with highest shares of visitor related businesses as a share of total businesses

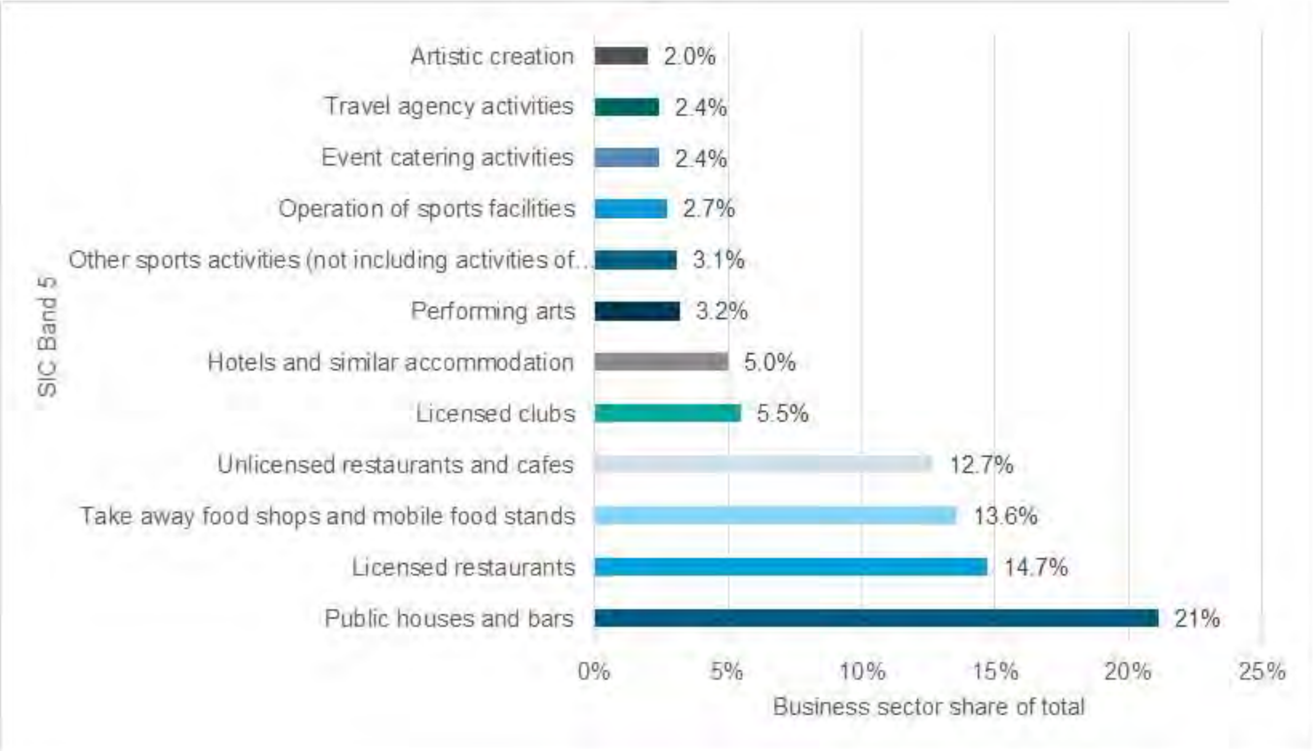


Source: Nomis, Business count, 2019

In terms of business numbers, the largest sectors in North's visitor economy are: Public houses and bars (21%), Licensed restaurants (15%), Take away food shops and mobile food stands (14%), and Unlicensed restaurants and cafes (13%). All of the sectors making up the largest shares of business numbers are in the food and beverage industry, where in total the food and beverage industry makes up 71% of all businesses in the visitor economy in the North of England.

[101] Center for Cities, *What's in store? How does the amenity offer differ across cities*, 2019

Figure 3-4 - Broad sector break down of businesses in the North's visitor economy



Source: Nomis, Business count, 2019

Manchester case study

Greater Manchester's vision for its visitor economy is for the city to be perceived and used by international and domestic audiences as a year-round, vibrant and stimulating cultural city destination[1].

Greater Manchester's strong visitor economy offer provides something to keep every kind of visitor interested and entertained. Manchester has a great food and drink offering, a strong city centre retail offer, a thriving creative sector, a diverse cultural offering, world famous sporting facilities, great business and conference facilities, and is an excellent gateway to other rural and coastal destinations across the North. This diverse offering is why Manchester is the UK's second most visited city and third most attractive destination for international visitors.

- Conference and business events support the wider tourism industry through the employment they support, and the revenue streams they generate. Manchester hosted 35 ICCA-ranked events in 2019 ranking it 82nd internationally and 4th in the UK.[2]
- The city-region has a thriving creative, media and digital sector with a varied programme offering cultural events, concerts, and exhibitions. Manchester is also home to major UK venues including Manchester Arena, The Lowry, the Palace Theatre and The Bridgewater Hall which regularly attract large audiences[1]. Other events, such as Parklife and the Pride Festival also draw significant crowds to the city.
- Manchester has a strong retail offering including Manchester Arndale, the UK's largest inner city shopping mall, the Trafford Centre, Bury and Bolton markets, the Royal Exchange, and Spinningfields. Manchester also launched city centre BID (Business Improvement District) in 2013 to increase footfall through events. [1]
- The city-region has a strong sport offering and identity, including the profile of Manchester United and Manchester City football clubs, the opening of the National Football Museum in 2012, regular programme of sporting events (NBA Basketball and the Great City Games), the National Cycling Centre at Manchester Velodrome, the Manchester Aquatics Centre, regional gymnastics centres, regional tennis centres, and participatory events such as the Manchester Marathon[1].

STEAM findings on Greater Manchester

Between 2005 and 2018:

- The total number of jobs (FTEs) supported increased by 48%
- The number of day visits increased by 44%
- The number of overnight visits increased by 28%
- The total number of visitors increased by 42%

Between 2017 and 2018:

- The total number of jobs (FTEs) supported increased by 5%
- The number of overnight visits increased by 3%
- The number of day visits increased by 4%

The most mentioned activities undertaken by visitors to Manchester were; eating out (73%), shopping (59%), visiting a museum and gallery (58%), visiting bars and clubs (29%), visiting a historical site or building (25%), visiting an 'other' attraction, and spectating or participating in a sports event (13% each).[2]

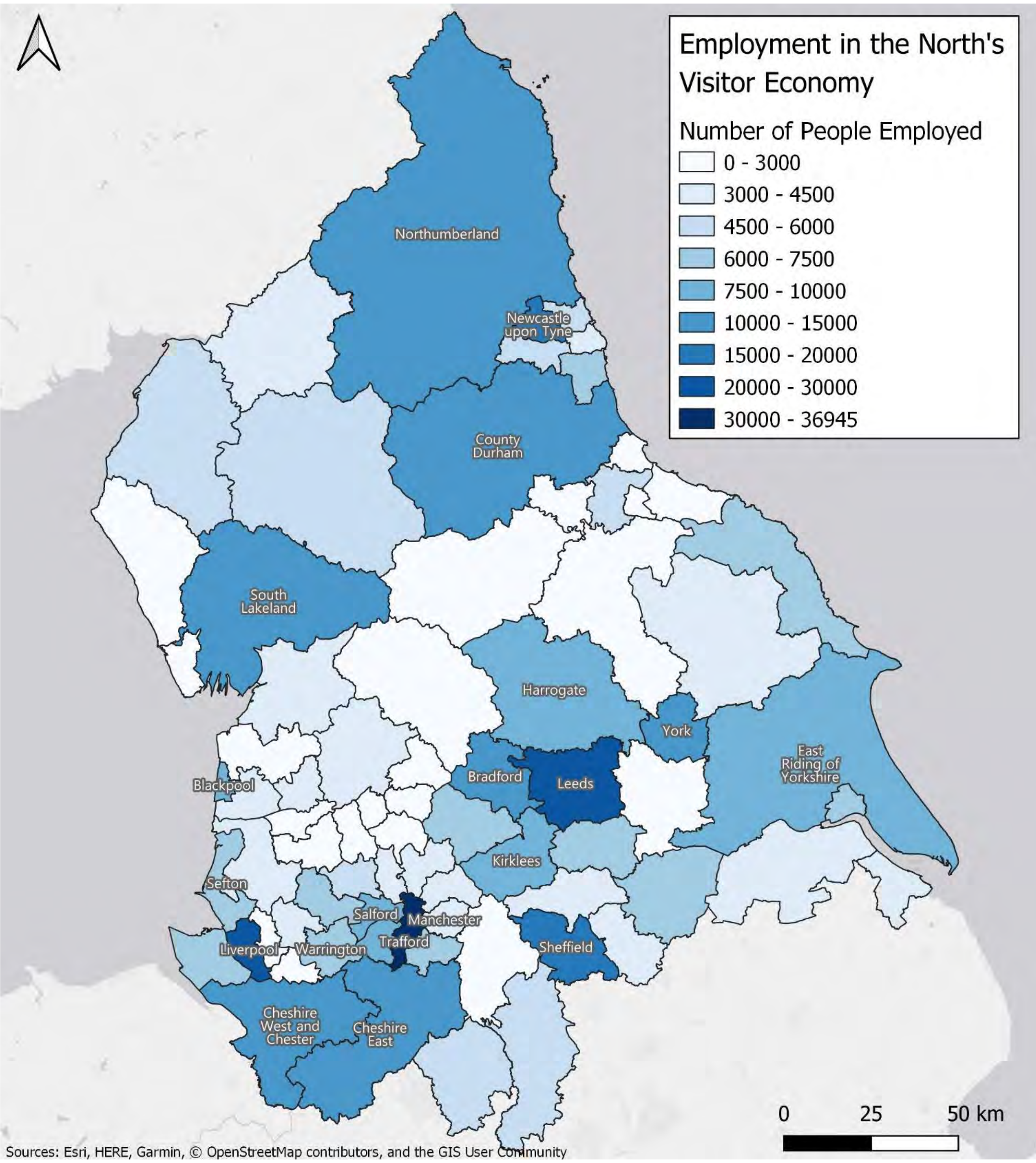
[1] - Greater Manchester Strategy for the visitor economy, 2014-2020

[2] – Marketing Manchester, Greater Manchester Leisure Visits Survey 2018

3.2.2. Employment

Data has been collated on employment numbers in sectors that capture the visitor economy, this data is available at the regional and Local Authority level for the North of England. Figure 3-5 summarises this data, displaying the number of people in employment by region in the North and broad industrial group. These figures refer to the employment which is directly associated with the visitor sector, in additional to this the visitor economy sector supports a large number of other jobs indirectly through its supply chain.

Figure 3-5 - Employment in the visitor sector by local authority



Source: NOMIS, BRES, 2019

There are approximately 579,000 people in employment in the visitor sector across the North of England. The largest proportion of this employment is found in the North West (49%), followed by Yorkshire and The Humber (32%). However, just 16% of employment in the sector is found in the North East region. These proportions are largely congruent with the business concentrations detailed in section 3.2.1.

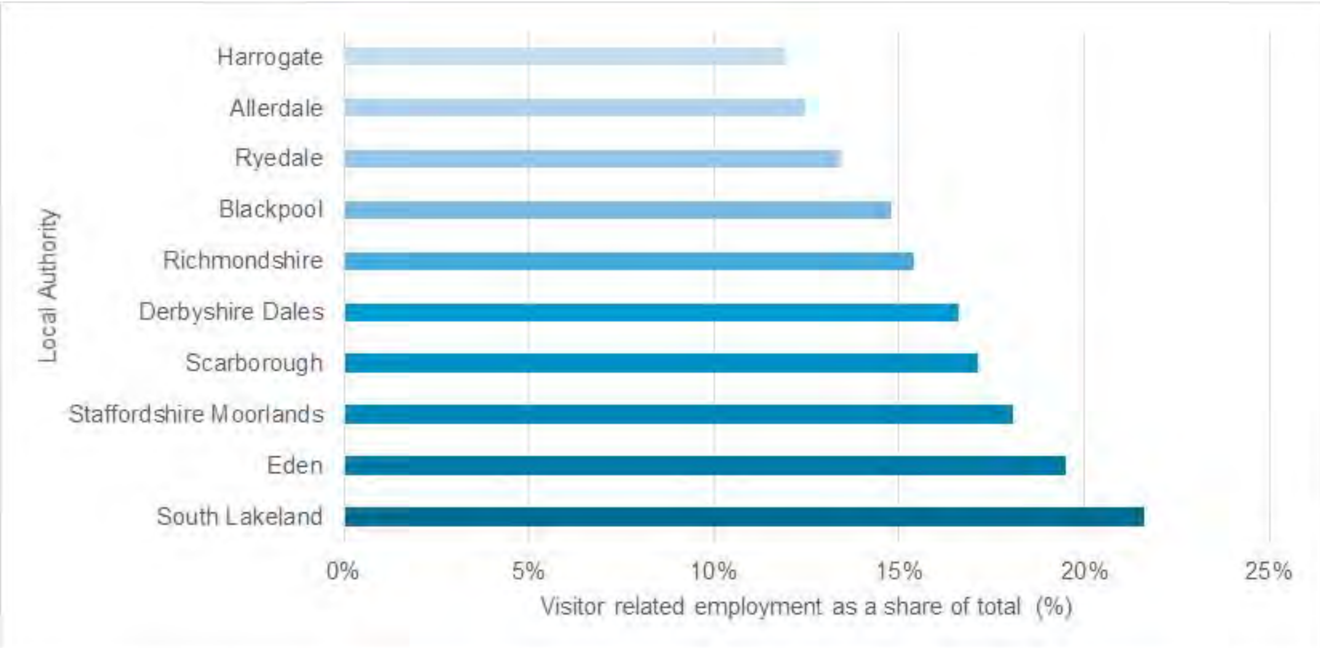
As highlighted in section 3.2.1, cities have higher numbers of businesses in the visitor sector, and there is significant employment in these businesses. Figure 3-5 summarises the local authorities in the North of England with the highest employment in the visitor sector. The local authorities of Manchester, Leeds, Liverpool, Newcastle and Sheffield have the largest visitor sector employment.

More detailed data on the employment by sector and Local Authority can be found in Appendix B.2.

The sectors which represent the visitor economy feature a large composition of part time work, where approximately 60% of the people in employment in the sectors across the North are in part time employment. These roles do have smaller economic impacts than full time roles, however they are highly valuable through their flexibility as they provide employment to people who are unable to or choose not to work in a full time role. The analysis of the value of the visitor economy takes into account this part-time basis and uses full time equivalents (FTEs) as appropriate.

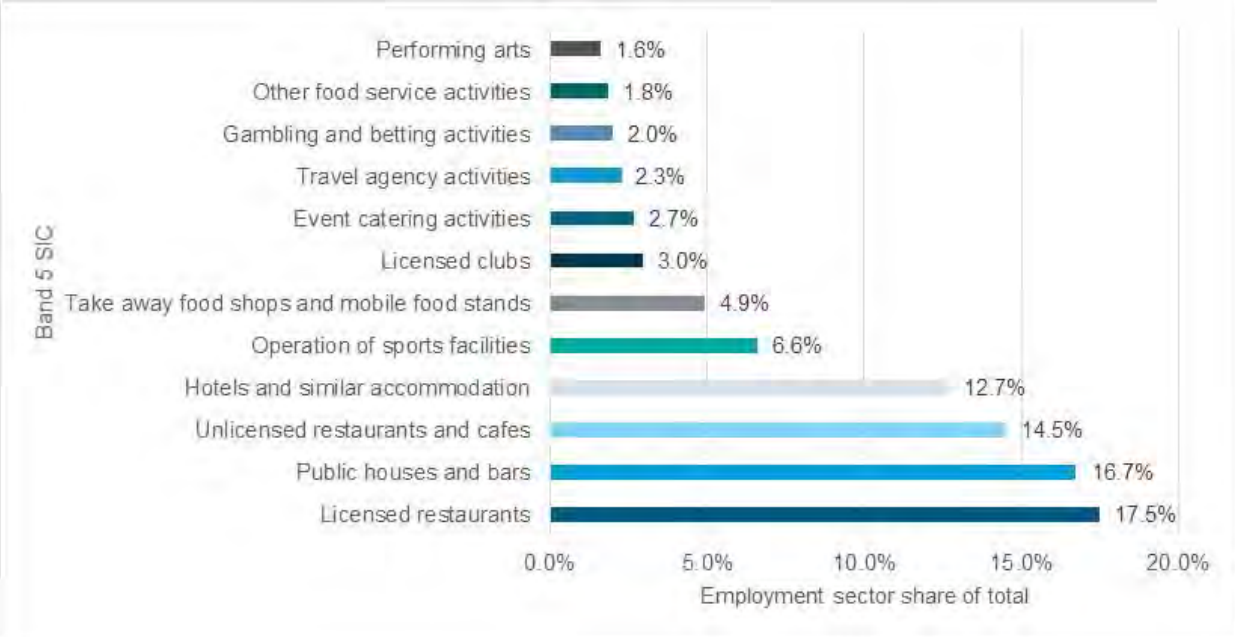
South Lakeland has the highest proportion of visitor related employment of the LAs in the North, where 22% of all employment in South Lakeland is in visitor related sectors. As shown in Figure 3-6, Eden (19%), Staffordshire Moorlands (18%), Scarborough (17%), Derbyshire Dales (17%) and Richmondshire (15%) also have a high proportion of visitor related employment, ranking in that order as the top 6 local authorities with the highest shares of visitor sector employment as a share of total employment.

Figure 3-6 - Local authorities with highest shares of visitor related employment as a share of total



Source: Nomis, BRES, 2019

Figure 3-7 - Broad sector break down of the North's visitor economy by employment



Source: Nomis, BRES, 2019

Figure 3-7 summarises a breakdown of the employment in the North's visitor sector by level five SIC, defined in 3.1. In terms of employment, the largest sectors in the North's visitor economy are Licensed restaurants activities (18%), Public houses and bars (17%), Unlicensed restaurants and cafes (15%), Hotels and similar accommodation (13%), and Operation of sports facilities (7%).

3.2.3. Summary of supply side analysis

There are roughly **39,000 businesses in the visitor sector across the North**. The local authorities of Leeds (1,800), Manchester (1,700), Sheffield (1,300), and Liverpool (1,300) have the largest number of visitor related businesses. The local authorities with the highest proportion of visitor related businesses as a share of total businesses are Scarborough (16%), Blackpool (13%), South Lakeland (12%) and Newcastle upon Tyne (11%).

There are approximately **579,000 people in employment in the visitor sector across the North of England**, much of which is in part time roles. Many of the North's cities have high numbers of businesses in the visitor sector, and there is significant employment in these businesses. The Local Authority areas with the highest proportion of employment in the visitor economy as a share of total employment are South Lakeland (21%) Eden (19%), Staffordshire Moorlands (18%), Scarborough (17%), Derbyshire Dales (17%) and Richmondshire (15%).

There are a total of **35,000 businesses in North of England which offer accommodation**, however data shows that **occupancy rates have fallen significantly in 2020 as a result of the pandemic**.

3.2.4. Further supply insights

The table below summarises the number of businesses in the North of England which offer accommodation, according to this data there are over 35,000 businesses of this sort in the North. This data uses a different methodology to the ONS Business Register and therefore does not match the data presented on business numbers in the central analysis, this data has been included to add another layer of detail but should not be compared against other data in the report. Across these 35,000 accommodation businesses there are 403,000 rooms. According to Visit England’s occupancy survey, room occupancy in both November 2018 and November 2019 in the UK was 79%, however in November 2020 this had dropped to 28% room occupancy rate. The UK regions which experienced the largest decline in room occupancy were Greater London (from 85% to 21%), North West England (78% to 24%) and Yorkshire and The Humber (80% to 27%).

Table 3-1 - Number of businesses in the North that provide accommodation services

Region	Hotels and similar establishments	Holiday dwellings	Tourist campsites	Other collective accommodation	Total
North East	2,470	1,030	880	90	4,470
North West	9,900	4,910	4,350	400	19,560
Yorkshire and The Humber	6,070	2,830	2,430	310	11,630
North of England	20,140	9,950	8,650	930	39,670

Source: Total Accommodation Stock, Visit Britain Great Britain tourism survey, 2016

**Figures may not sum exactly as a result of rounding*

**Figures for the North of England total also include data on the midlands which represents the section of the Peak District that falls outside of the North of England*

Newcastle case study

A large share of businesses and employment in the visitor economy is concentrated in the cities of the North. As highlighted above, one of the cities with high employment numbers in the visitor economy sector is Newcastle.

Newcastle has recently been voted the UK's best short break destination and this vibrant city is now considered one of the world's new cultural hotspots, with many popular attractions. Newcastle is full of history, with the city centre having more than 70 Grade I listed buildings. Important architectural landmarks feature in the city centre from the elegant streets of Grainger Town to the contrasting and impressive contemporary architecture of the Gateshead Millennium Bridge. Newcastle-upon-Tyne is the largest city in the North-East of England and many of the city's impressive 19th-century streets follow the River Tyne, which meanders close to the heart of the city.[1]

Newcastle has many tourist attractions and historic buildings, including the Tyne Bridge, Gateshead Music Centre, Earl Grey's Monument, the New Castle, St Nicholas Cathedral, St Mary's Cathedral, and St James Park Stadium. The city is also home to numerous museums, theatres and galleries. The city is easily explored on foot or by public transport and is well endowed with top-class restaurants, cafes, bars, attractions and nightlife. Gateshead, especially Quayside, Jesmond and the Ouseburn Valley are particularly popular with visitors, with trendy independent shops and eateries and a lively atmosphere.

There is a diverse landscape of history, culture, coast and countryside beyond the city centre. Newcastle is located in close proximity to a great expanse of Northumberland countryside, which is home to Hadrian's Wall, castles, and ancient Roman Forts[1], as well as the North East coastline which stretches for miles into Northumberland into the North, and south to the famous River Tyne and beyond. The city is the perfect base to explore the surrounding region.

Between 2014 and 2019:

- Visitor numbers grew by 1.5 million
- Total visitor spend increased by 30%
- There has been more than £100m of private sector investment in the visitor economy

Sources: Newcastle Gateshead, Explore Newcastle Gateshead Page, Available at: https://newcastlegateshead.com/explore

Retail and the visitor economy

While retail has been excluded from the central analysis due to the difficulties in quantifying the proportion of retail activity attributable to the visitor economy, its importance to the visitor economy from both an economic and tourism perspective is recognised.

Although the data on purpose for visit (detailed in the individual visit number sections) doesn't identify shopping and retail as a key visitor activity, the sub sector is still an important element to the visitor economy. Shopping and retail is often a key activity many visitors to the North partake in and is often part of the motivation for a visit to some of the North's towns.

According to ONS data on high streets, there are nearly 7,000 high streets across Great Britain, 276 of these are in the North East, 866 in the North West and 640 are in Yorkshire and The Humber. On Yorkshire and The Humber's high streets there are 24,000 businesses, on the North West's there are 40,000 and on the North East's 10,000[1].

Employment on high streets in the accommodation and food sector increased by more than 20% in every UK region between 2012 and 2017. Over this period the number of retail businesses on UK high streets fell by 2%, while those not based on the high street grew by 6%. There are lower numbers of high street retail businesses over the last five years across all regions, except in the North West, where they grew by 7%, and in London[2].

The Covid-19 Pandemic has had a significant effect on high streets and retail centres in the UK; Springboard data reports a 33.7% fall in footfall between September 2019 and September 2020. [3]

In order to understand the retail offering in the North before the impacts of the pandemic, information and data from 2019 has been used. In 2019, 10 retail centres in the North ranked in the top 50 retail centres in the UK on the Vitality index, Harrogate ranked 22nd, Meadowhall ranked 23rd, Ilkley ranked 29th, Leeds City Centre ranked 34th, Trafford Centre ranked 44th, Chester City Centre ranked 46th, York City Centre ranked 47th, Liverpool City Centre ranked 48th, and Manchester City Centre ranked 50th [4].

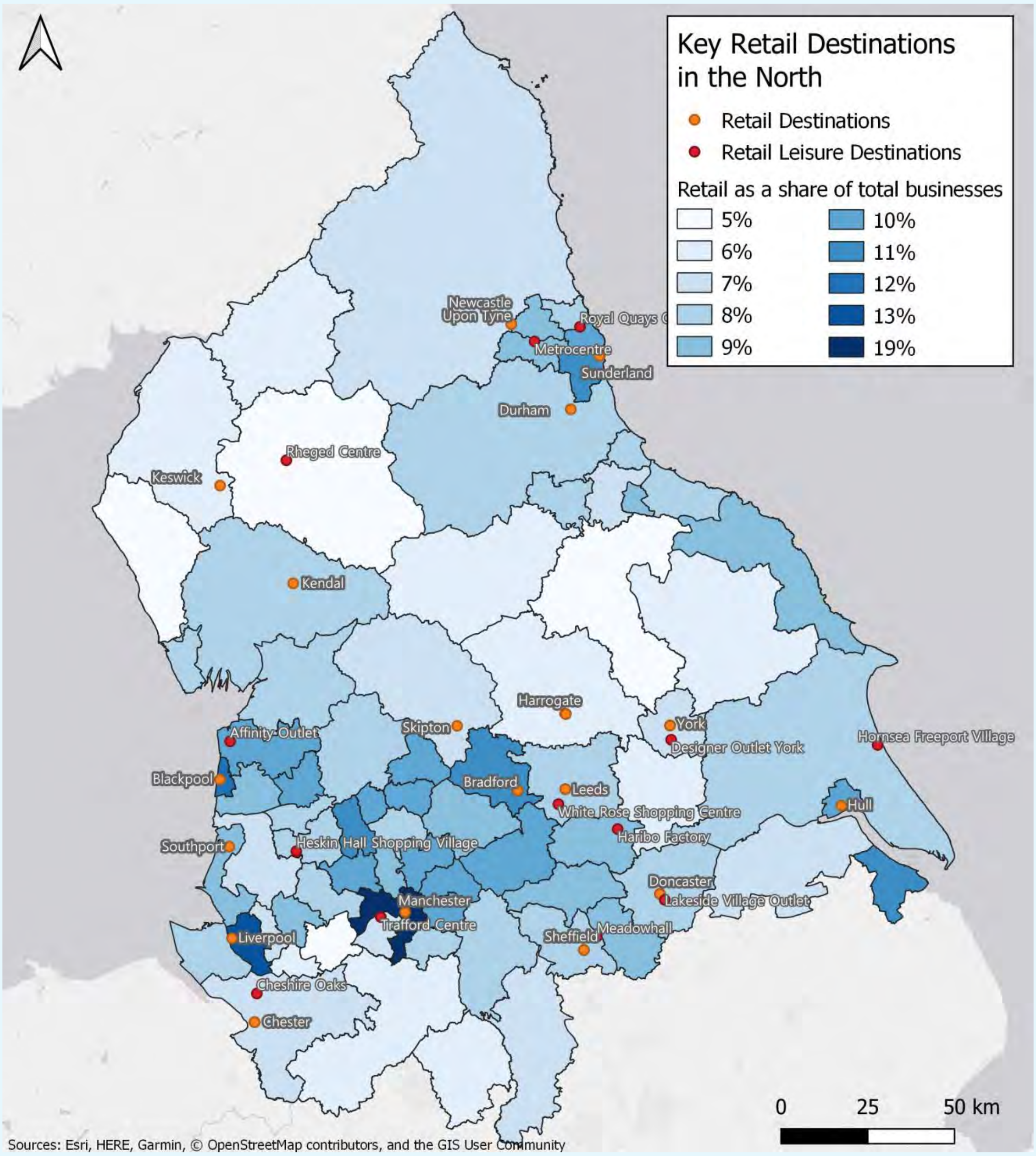
In the North there are 719,000 people in employment in the retail sector, the majority are in the North West of England (49%) and Yorkshire and The Humber (34%). Hyndburn, Wyre, Hartlepool, and South Lakeland have the highest proportion of employment in retail (as a share of total employment) of any local authority in the study area.

There are 48,000 businesses in the retail sector in the North, the majority are in the North West of England (54%) and Yorkshire and The Humber (32%). Salford, Manchester, Liverpool, and Blackpool have high numbers of retail businesses as a share of total businesses.

The below map shows the key retail and retail leisure destinations in the North. These were identified by Leisure Consultancy Ltd using a number of criteria, drawing on both retail rankings and the overall perception of the contribution retail makes to the visitor offer. **Retail destinations** are defined as city and town centres with a strong retail offer which attract visitors from the surrounding region and beyond. **Retail leisure destinations** are out of town retail centres which combine significant retail businesses, often outlet stores, with a comparably strong leisure offer such as cinemas and restaurants. Movement patterns to and from retail destinations and retail leisure destinations are often markedly different – while town and city centre retail destinations often have good bus and rail access, retail leisure destinations are often located close to major motorway junctions and offer free parking, therefore encouraging and generating high volumes of car traffic.

These locations have been overlaid on top of a layer outlining the proportion of retail businesses as a share of total businesses. Interestingly, some of the key retail destinations in the North don't have a high proportion of retail businesses, for example York. However, shopping is often part of the day's activity for a visitor to York. For more detail on the unique visitor and retail offering of York refer to the York Case Study in section 3.3.2.1.

Figure 3-8 - The North of England's Primary Retail Offer



[1] – *ONS, High streets in Great Britain, 2019*

[2] – *ONS, Article: Mapping the location and characteristics of high streets in Great Britain, 2019*

[3]– *Retail Times, Article on Footfall across all retail destinations throughout the UK, 2020, Accessed at: https://www.retailtimes.co.uk/footfall-across-all-retail-destinations-throughout-the-uk-declined-by-6-3-last-week-springboard-shows/*

[4]– *Harper Denis Hobbs, Retail Vitality Index, 2019*

Liverpool case study

The Liverpool City Region has a strong and varied visitor offering. The city itself provides creative, cultural and musical offerings as the Capital of Pop and is home to more museums and galleries than anywhere else in the UK outside of London. In 2008 Liverpool was the European Capital of Culture; and as a result, the city saw a noticeable boost to its ongoing growth. There are also many listed buildings and green spaces within just a few minutes of the city centre, making for an enjoyable walking experience.

Liverpool has an attractive and safe city centre, which contributes to its strong night-time economy. The city offers a range of activity choices for visitors, including a good selection of high standard restaurants and a wide-ranging leisure and shopping offer, which includes the Liverpool One development and historic Albert Dock.

The City Region has a good outdoor and nature offering, with a famous coastline including the Sefton and Wirral Coasts and the resorts of Southport and New Brighton, whilst inland there are attractions related to industrial archaeology, and a modern Shakespeare playhouse is being created in the market town of Prescot.

There is also a strong international and nationally significant sports presence in the City Region, including internationally recognised top-flight football and rugby teams, and events which attract visitors from across the world such as the Grand National and Open Golf Championship.

The Liverpool City Region is highly accessible to visitors by road, rail, and bus. The local high quality and high frequency Merseyrail network plays a key role in dispersing visitors throughout the City Region, while the West Coast Main Line provides connectivity and access to visitor markets from London and the South. The area has an international airport, with connections by ferry to the island of Ireland and the Isle of Man, reflecting long-standing social, cultural and economic links. Liverpool riverfront also has a cruise liner terminal with an immigration area where in 2019 there were 53 cruise ship calls and 33 turnaround cruises; to support this growing market, development is underway on a larger cruise facility. Furthermore, the Mersey Ferries perform a dual role, as a vital cross-river service for commuters during the peak hours and offering a range of river cruises to visitors at other times.

Liverpool City Region STEAM data (2018 - 2019) identifies that between 2018 and 2019:

- International visitors increased by 5%
- Domestic visitors increased by 12%
- In 2018 Liverpool was the 6th most visited city in the UK for international visitors and 7th in England for domestic visitors (2017)*.
- In 2019 Liverpool was the 5th most visited city in the UK for international visitors and 4th in England for domestic visitors (2018)*.
- The number of total business trips to Liverpool increased by 7%

Business meetings and events case study

National Context[102]

In total, the UK's events industry is estimated to be worth £70 billion in direct spending, accounting for over 50% of the UK's visitor economy. Over £31 billion of this total is comprised of business events, principally meetings, conferences and exhibitions. In 2018 inbound business visits to the UK represented 22% of all visits, contributing 8.4 million visits; with inbound business events attendees being more 'valuable' visitors, spending 30% more on average than leisure visitors. Of course, many business events visitors will also extend their trips for leisure purposes. Aside from the economic impacts, there is a much wider recognition of the many other benefits from hosting conferences and business events such as: research sharing, knowledge transfer, professional development, networking and relationship building, and the attraction of inward investment opportunities.

VisitBritain and VisitEngland have developed a strategy to increase business events in the UK and have a goal to enable dispersal. There is an understanding that business events activity is concentrated in London and that English regional destinations need support to be more competitive and to access international markets.

Manchester[103]

Manchester is a key hub for business conferences and events in the North of England. In 2018, Marketing Manchester identified the value of the sector to Greater Manchester as £904 million, with the sector estimated to support 22,000 direct jobs within Greater Manchester through its core activity, and 35,100 jobs when including indirect jobs in the supply chain, some of which will be based in Greater Manchester, some in other areas. The average value of a 'day' delegate (per trip) was £93 (£47 more than a leisure day visitor on average), whilst the average value of a staying delegate was £321 (per trip). In 2019, Manchester hosted 35 ICCA (International Congress and Convention Association) -ranked events resulting in a global ranking of 82nd and a UK ranking of 4th (behind London, Edinburgh and Glasgow). In Greater Manchester, 45% of delegates come through business booked within Greater Manchester, 70% from within the North West, 94% from within the UK and 6% from overseas. This highlights a significant opportunity to increase the number of overseas delegates, or delegates from other parts of the UK in a drive towards an improved visitor economy in the North of England.

Leeds[104]

Leeds is the 5th most popular conference destination in the UK and has been increasingly establishing itself as a great city to host business events, having won the Best UK events destination in the C&IT (Conference and Incentive Travel) Awards 2020. Business tourism is estimated to be worth £543.3 million to the economy, and Leeds welcomed 3.5 million delegates in 2019, hosting 52,400 meetings, conferences and events in 2019. The city is in the top 15 of UK cities in the ICCA rankings and has 25 hotel developments in the pipeline to host further staying delegates in the future.

[102] uk-events-report-2020---the-full-report.pdf (excel.london)
[103] Marketing Manchester One Stop Intelligence Document, provided by project Steering Group member
[104] Leeds Visitor Economy Impact Summary, provided by project Steering Group member

3.3. Demand side

The following analysis provides a demand side profile of the North's visitor economy and its sub-sectors/segments across the study area. This analysis is provided at the Local Authority level, regional level and pan Northern level. This profile highlights the key features of the visitor economy from the demand side, understanding the differences between areas across the North.

3.3.1. Profile of visits

3.3.1.1. Day visits

Domestic

Data on the number of domestic day visits that captures the demand side of the visitor economy has been collected at the regional, county and Local Authority level for the North.

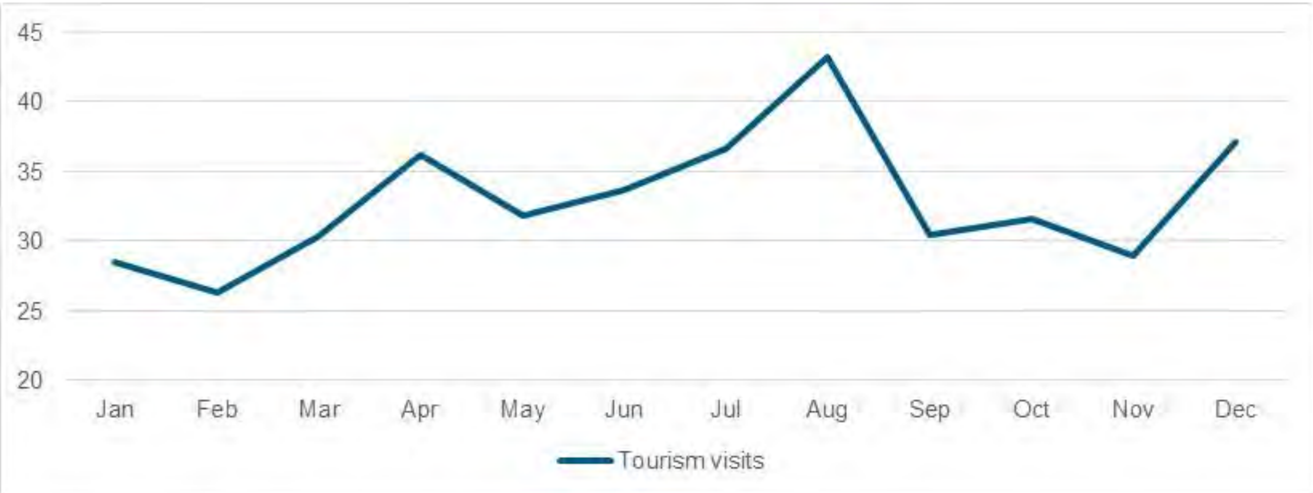
The total number of domestic day visits the North received in 2019 was 384,571,000. The largest proportions of these visits were received by the North West of England (174,263,000) and Yorkshire and Humber (137,670,000), with the North East of England receiving 59,805,000 domestic day visits in 2019.

The top four largest receivers of domestic day visits were four of the North's main cities. Manchester Local Authority received the highest number of domestic day visits at 29,666,000. Leeds (22,708,000), Liverpool (14,352,000), and Sheffield (13,796,000) were the second, third and fourth largest receivers of domestic day visits. Newcastle-upon-Tyne, Cheshire West and Chester, and County Durham are the next 3 largest receivers of domestic day visits.

The main activity of domestic day visits to the North is visiting friends or relatives (VFR), where 24% of visits to the North East of England are for this purpose, 22% of visits to the North West of England and 20% of visits to Yorkshire and Humber. Going out for a meal is the second most common reason people make a day trip in the North of England, where 8% of visits to the North East of England are for this purpose, 9% of visits to the North West of England and 11% of visits to Yorkshire and Humber. Other common activities include a "general day out", outdoor activities and going for a night out. In England most domestic day visits last 3 - 4 hours, in the North East of England 43% of the domestic day visits last this duration, in the North West 40%, and in Yorkshire and the Humber 37%[105].

Domestic day visits to the North vary seasonally, with peak months being identified as April, August, and December, mirroring the main UK holiday periods of Easter, Summer, and Christmas. Months of lowest demand are February, September, and November.

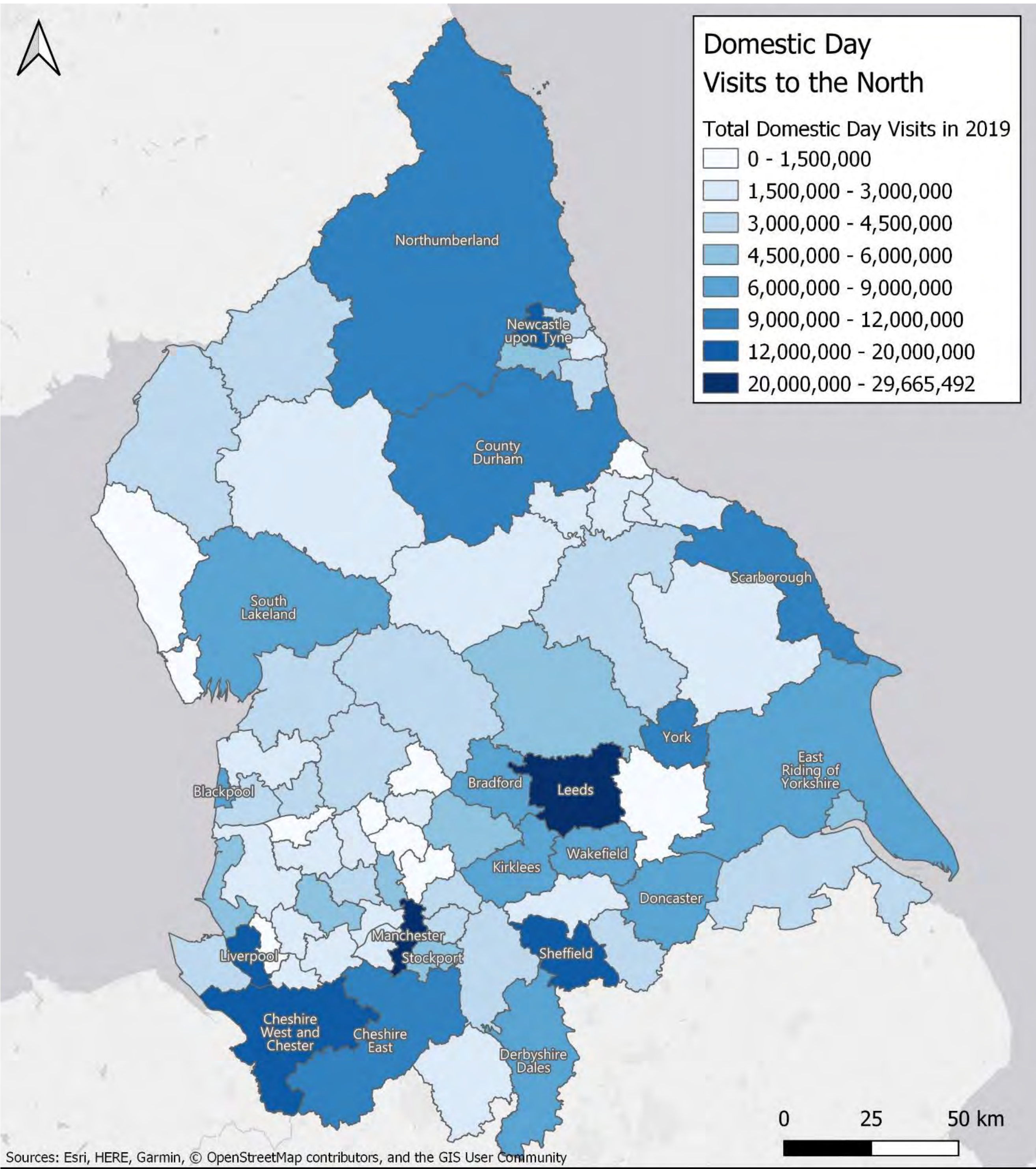
Figure 3-9 - Domestic day visits to the North by month (millions)



Source: Rand Europe analysis of Visit Britain domestic visits data (GBDVS and GBTS)

[105] KANTAR, The Great Britain Day Visitor Annual Report, 2019

Figure 3-10 - Domestic day visits to local authorities across the North



Source: Visit Britain, GBTS Domestic day tourism by residents of Great Britain, 2019

Scarborough Case Study

Scarborough is a key visitor destination in the North. It is the ninth largest receiver of domestic day visitors in the North, the eight largest receiver of international day visitors in the North, and the sixth largest receiver of domestic overnight visits in the North.

Scarborough has a rich history as a tourist destination, being one of Britain's original seaside resorts. Scarborough and the wider borough are a hotspot for British holiday makers. The borough's own figures show that 97 % of all trips to Scarborough are made by British holiday makers with the remaining 3% made up of overseas visitors. Tourists visit Scarborough for its wide tourism offering, including two picturesque beaches, numerous attractions, and a rich history.[1]

As a holiday destination, Scarborough has a diverse offering; dramatic cliffs and castle headland, award-winning beaches, historic harbour, family-friendly attractions and a lively town centre. Scarborough is also well located in close proximity to the seaside town of Whitby, Dalby Forest, The North York Moors National Park, the Wolds and the dramatic scenery of the Yorkshire Coast, making Scarborough an ideal base from which to explore the surrounding region.[2]

Scarborough is home to a number of attractions, such as Sealife, and Alpamare waterpark, entertainment venues including the Stephen Joseph Theatre, The Spa and Scarborough Open Air Theatre and museums like The Rotunda, as well as being home to the oldest funicular cliff railway in Britain.[2]

Scarborough hosts a number of events throughout the year including Scarborough Cricket Festival, Seafest, Scarborough Goldwing Light Parade, Armed Forces Day, a number of musical performances at Scarborough's Open Air Theatre and the bike races at Oliver's Mount which take place throughout the year.

Cambridge Tourism Economic Impact Model Data on Scarborough identifies that between 2018 and 2019:

- Volume of domestic overnight trips increased by 4%
- Volume of inbound overnight trips fell by 1%.
- Overnight visitor expenditure increased by 2%,
- Day visitor trips rose by 24%
- Day visitor expenditure rose by 24%

Source: [1] Discover Yorkshire Coast, Available at: [https://www.discoveryorkshirecoast.com/scarborough]

[2] Visit Scarborough, Available at: [https://www.visitscarborough.com/scarborough]

International

International day visitors are the visitors who take a day trip to a different city / town from the city / town that they stayed in for at least one night. The definition of a day trip was that a minimum of 1 hour must have been spent in the day trip destination. All data reported in this section was taken from Visit Britain's Day Visits report: a profile of overseas holiday visitors (2019)[106] unless stated otherwise.

Table 3-2 presents the largest receivers of international day visitors. Two of the North's main cities, Liverpool and Manchester, received the highest number of international day visitors at 148,000 and 144,000 respectively. York, Leeds, Chester, Blackpool, and Newcastle are the next 5 largest receivers of international day visitors in the North.

Table 3-2 - International day visitors in the North

Rank	City or Town	International day visitors (2019)
1	Liverpool	148,000
2	Manchester	144,000
3	York	129,000
4	Leeds	83,000
5	Chester	74,000
6	Blackpool	47,000
7	Newcastle	40,000
8	Scarborough	40,000
9	Harrogate	31,000
10	Sheffield	31,000

Source: Visit Britain, IPS inbound (international) overnight tourism, 2019

The five towns or cities in the North with the highest numbers of international day VFR visitors are Manchester (81,000), York (63,000), Liverpool (56,000), Leeds (54,000), and Chester (40,000). The five towns or cities with the highest numbers of international day holiday visitor numbers in the North are Liverpool (69,000), York (54,000), Manchester (32,000), Chester (27,000), and Leeds (21,000). The three local authorities with the highest numbers of international day business visitor numbers North are Manchester (13,000), Leeds (10,000), and York (7,000).

Shopping is one of the most popular activities for international visitors to the UK, with 55% of all visits involving shopping in 2017. Around 63% of international visitors to the UK dine in restaurants, 47% partake in sightseeing famous monuments or buildings, and 41% go to the pub.[107]

Research undertaken by Visit Britain into the travel habits of international visitors[108] found:

- Visits to Yorkshire are more likely to include countryside, villages and national parks than those in most other areas.
- Visits to Yorkshire are likely to include shopping and dining in restaurants.
- The North West welcomes the highest proportion of all British nations and regions to attend live sports events and football matches.
- The North West's culture is a major draw, especially live music but also bars and nightclubs
- The North West is popular with young visitors, whose visits involve socialising with the locals, going to the pub and going to nightclubs.
- The North East is popular with visitors for eating out, going to pubs, bars and clubs
- Short breaks to the North East are popular among overnight visitors

[106] This report uses data from the IPS where VisitBritain sponsored an additional question regarding international day visitors.
[107] VisitBritain, Activities undertaken in Britain Data, 2017
[108] VB, Activities in Britain's nations and regions Foresight – issue 165, 2019

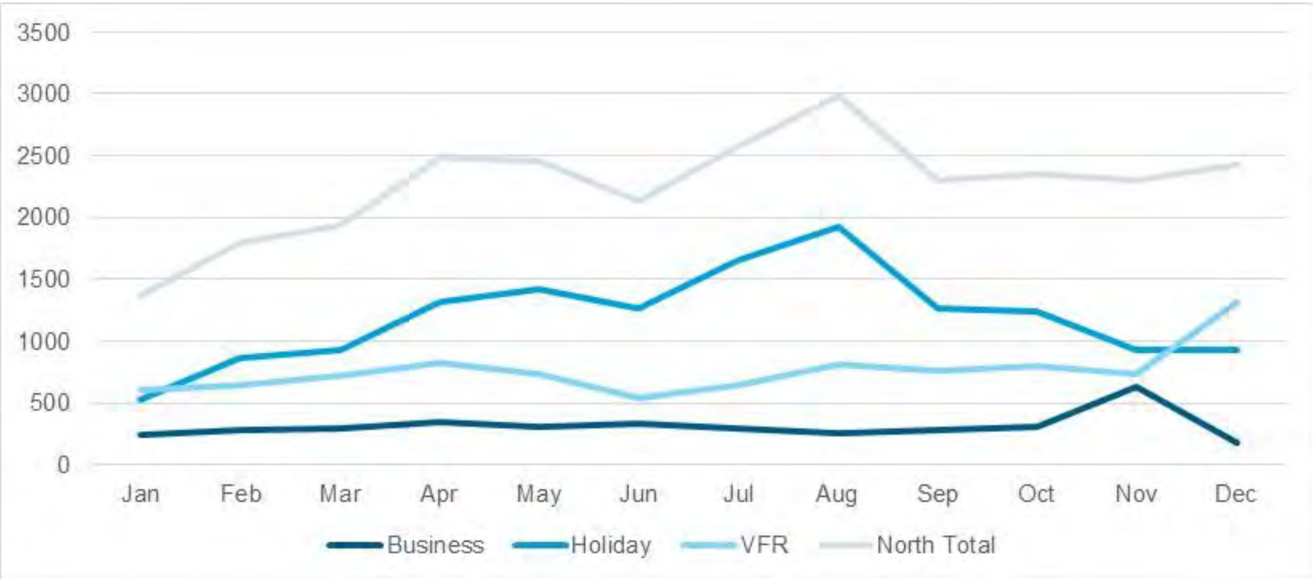
3.3.1.2. Overnight Visits

Domestic

In 2019, the North received a total number of 28,947,000 domestic overnight visits. The largest share of these visits were received by the North West of England (13,507,000) and Yorkshire and Humber (10,251,000), while the North East of England received 3,996,000 domestic overnight visits in 2019. The average trip length for a domestic overnight visitor into the North was 3 nights. The top three largest receivers of domestic overnight visits at Local Authority level were three of the North's main cities. Manchester received the highest number of domestic overnight visits at 2,669,000, while Liverpool and Leeds were the second and third largest receiver of domestic overnight visits. The local authorities of South Lakeland, York, and Scarborough are the next 3 largest receivers of domestic overnight visits. South Lakeland and Scarborough in particular have a high proportion of businesses in the visitor economy (Figure 3-3) and a high proportion of employment in the visitor economy (Figure 3-6).

Domestic overnight visits to the North also exhibit strong seasonal trends, particularly for leisure purposes such as holidays, and visiting friends and relatives. Peaks associated with holiday trips to the North are observed during April, May, July, and August. Trips to the North to visit friends and relatives peak during April and December, mirroring key UK bank holidays. Business trips to the North remain steady during most of the year, but rise slightly in November, before falling during December.

Figure 3-11 - Domestic overnight visits to the North by month (thousands)



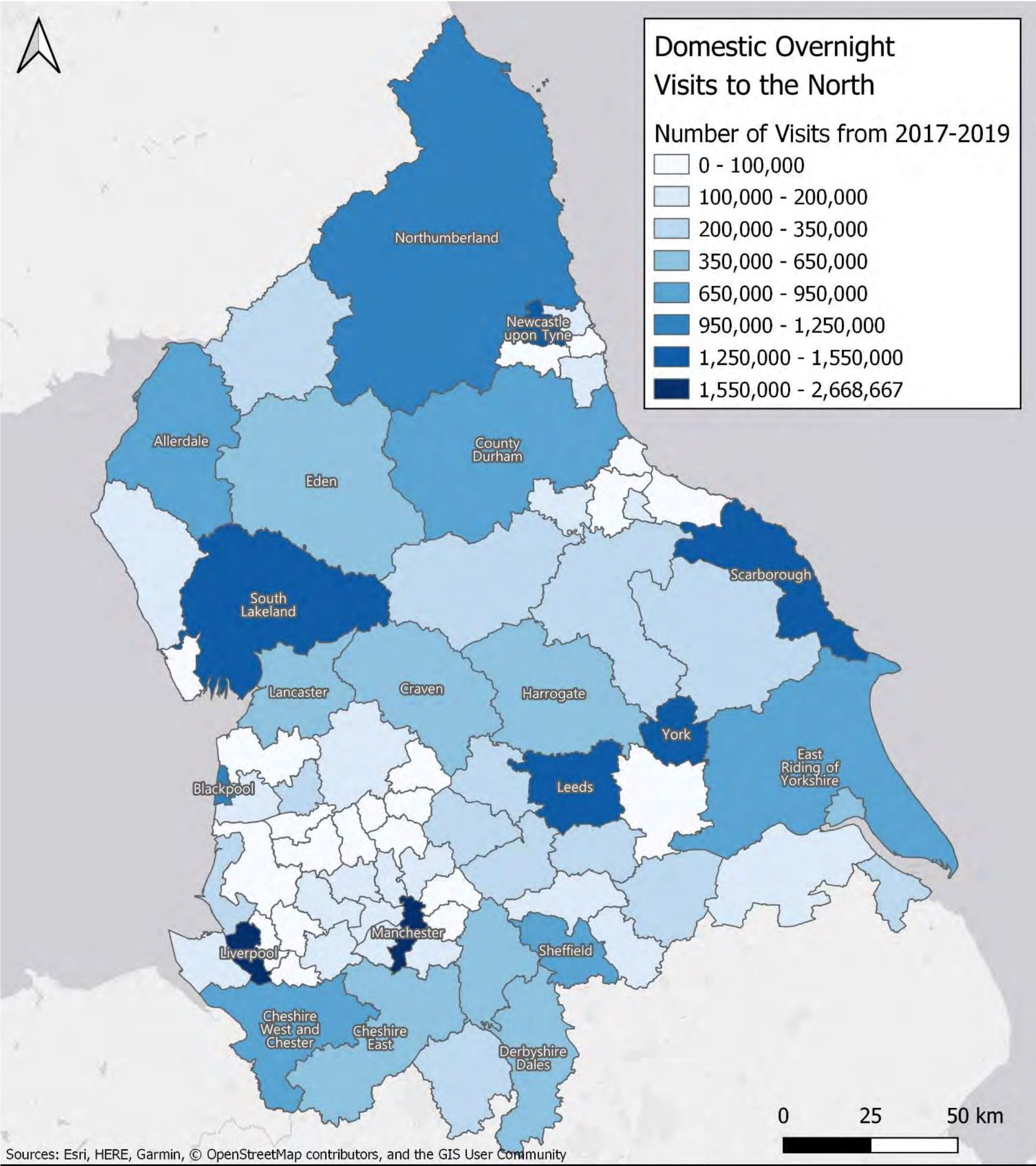
Source: Rand Europe analysis of Visit Britain domestic visits data (GBDVS and GBTS)

Of the total domestic overnight visits to the North, 52% (14,962,000) are for holiday related purposes. This makes holiday trips the most common trip purpose for domestic overnight visitors to the North. The largest shares of these visits were received by the North West of England (7,075,000) and Yorkshire and Humber (5,108,000), whereas the North East of England received 1,917,000 domestic overnight visitor trips in 2019. Of England's top 10 local authorities with the highest numbers of domestic overnight holiday visitor trips, 7 are in the North. The five local authorities with the highest numbers of domestic overnight holiday visit numbers in the North are South Lakeland (1,201,000), Scarborough (1,121,000), Manchester (1,057,000), Blackpool (978,000), and York (854,000).

Of England's top 10 local authorities with the highest numbers of domestic overnight business visits, 5 are in the North: Manchester (670,000), Leeds (294,000), Liverpool (255,000), Newcastle (248,000), and Sheffield (168,000).

The average trip length for a domestic overnight visitor into the North of England was 3 nights, suggesting that when people visit the North, it is often for a long weekend or to visit family.

Figure 3-12 - Domestic overnight visitors to local authorities across the North



Source: Visit Britain, GBTS Domestic overnight tourism by residents of Great Britain, 2019

South Lakeland is the largest non-city receiver of domestic overnight visits in the North. A large part of the visitor economy offering across the North are the National Parks and associated natural beauty[1].

Lake District Case Study

Visiting the Lake District is one of the most popular breaks for people across the UK and from further afield. The Lake District National Park is the largest national park in England and has a wide range of activities and attractions, as well as the natural beauty of the entire area. The Lake District, located in the heart of Cumbria, is one of the most beautiful regions of the UK and is a UNESCO World Heritage Site.[1]

The Lake District attracts visitors to explore its beautiful lakes and mountainous fells and is often referred to as the UK's playground for walkers and outdoor enthusiasts. The Lake District is home to the highest mountain in England, Scafell Pike, which stands 978 metres above sea level. The Lake District offers a vast number of trails for walking, hiking and cycling, as well as being home to 12 of the UK's biggest lakes, including Lake Windermere which stretches over 11 miles, providing opportunities for swimming and water sports. [2]

Within the natural landscape is a rich human heritage of historic towns, traditional villages and vast expanses of farming land. The bustling small towns of Ambleside on Lake Windermere and Keswick on Derwentwater are particularly popular with visitors. The Lake District has a well-established culinary offering and also offers visitors a wide range of accommodation options from luxury hotels, county inns and spas to self-catered cottages and campsites. The Lake District is accessible from both the M6 motorway and West Coast Main Line railway via the Lakes Line.

Lake District National Park STEAM Data (2019), **provided by Cumbria Tourism, identifies that** between 2018 and 2019:

- Day visitor numbers increased by 2.9%
- Overnight visitors increased by 1.3%
- Total visitors increased by 2.6%
- Total visitor spend increased by 4.9%

Between 2009 and 2019:

- Day Visitors increased by 23%
- Overnight visitors increased by 41%
- Total visitors increased by 27%
- Total visitor spend increased by 62%

Source: [1]Visit Cumbria, Article on The Lake District and Cumbria, Accessed at: [https://www.visitcumbria.com/]

[2] Lake District Tourist & Accommodation Guide, Available at: [https://www.lakedistricttouristguide.com/]

[3] Lake District National Park Article, Available at: [https://www.lakedistrict.gov.uk/visiting/things-to-do]

York Case Study

York is a city of history and culture, with some of UK's finest museums and cultural attractions, independent shops full of unique character selling local produce, and a wide range of food and drink experiences, ranging from international street food to fine dining in York's historic surroundings.

York offers the largest volume of tourist attractions per square mile of any city in the UK, and is home to many museums, theatres, galleries, and historic buildings, such as York Art Gallery, York Minster, the National Railway Museum, and York Dungeon. York Minster is one of the largest cathedrals in Northern Europe and one of the most beautiful gothic cathedrals in the world.

The city's rich cultural heritage dates back to Roman times, with York having the longest stretch of original city walls in England that were first erected by the Roman legions. The city was also once the capital of a Viking territory, with the medieval architecture still visible. The Shambles, thought to be the oldest shopping streets in Europe, is lined with 13th century timber-framed houses and traditional shopfronts, making it one of the UK's most historic and picturesque streets.

The city is well located, half-way between London and Edinburgh and with the glorious Yorkshire Dales, North York Moors and Wolds in close proximity. York is also home to the third biggest racecourse in the country, York Racecourse, and was voted the best place to live in the UK by the Sunday Times (2018).

York Cambridge Economic Model Data (2018, 2019, & 2020):

- Total visitors increased by 4% between 2017 and 2018
- Only 19% of visitors stay overnight
- Overnight visitors account for 51% of spend
- 55% of visitors travel to York by car, closely followed by rail (39%)

Source: Visit York, Findings from the York Visitor Survey, 2018 and 2020

Visit York, Economic Impact of Tourism in York, 2018

Visit York, Tourism KPIs: October 2020; Visit York, Tourism Intelligence Update, December 2019; Visit York, Tourism Intelligence Update, December 2020

International

The total number of international overnight visits the North received in 2019 was 5,596,000. The majority of these visits were received by the North West of England (3,579,000), followed by Yorkshire and Humber (1,412,000), and the North East of England (582,000).

The top three largest receivers of international overnight visits are three of the North's main cities: Manchester (1,661,000), Liverpool (844,556) and Leeds (337,813). This is also true for the domestic overnight visits. However, the next three largest receivers of international overnight visits are York (297,000), Newcastle-upon-Tyne (282,000) and "other towns" in Cheshire (244,000). Figure 3-14 presents this data aggregated to County level in order to provide the most accurate visualisation given the limitations of this dataset. More detailed data on the top 20 towns is provided in Appendix B.4.

Figure 3-13 shows the distribution of international visits to the North by month. For holidays, and trips to visit friends and relatives, peaks occur in August, April, and January (again reflecting traditional holiday periods), whereas business travel is steady over the year, except for a drop in December.

Figure 3-14 summarises the international overnight visit numbers by county, the top 10 towns/cities which receive the highest visit numbers have also been highlighted on this map. Many of the visitors to the North don't go to specific large towns, instead they go to a range of smaller towns and villages, individually these towns don't receive high visitor numbers, but when summed they are some of the largest receivers of international overnight visits. This is summarised in Table 3-3 below, which as well as larger individual towns summarises data of visitor numbers to "Other towns". Other towns are small towns / villages not listed and grouped by county instead. Other towns in Cheshire, Manchester and West Yorkshire counties when summed are the 6th, 7th and 9th largest receivers of international overnight visits.

Table 3-3 - Top 10 towns in the North with the highest international overnight visits

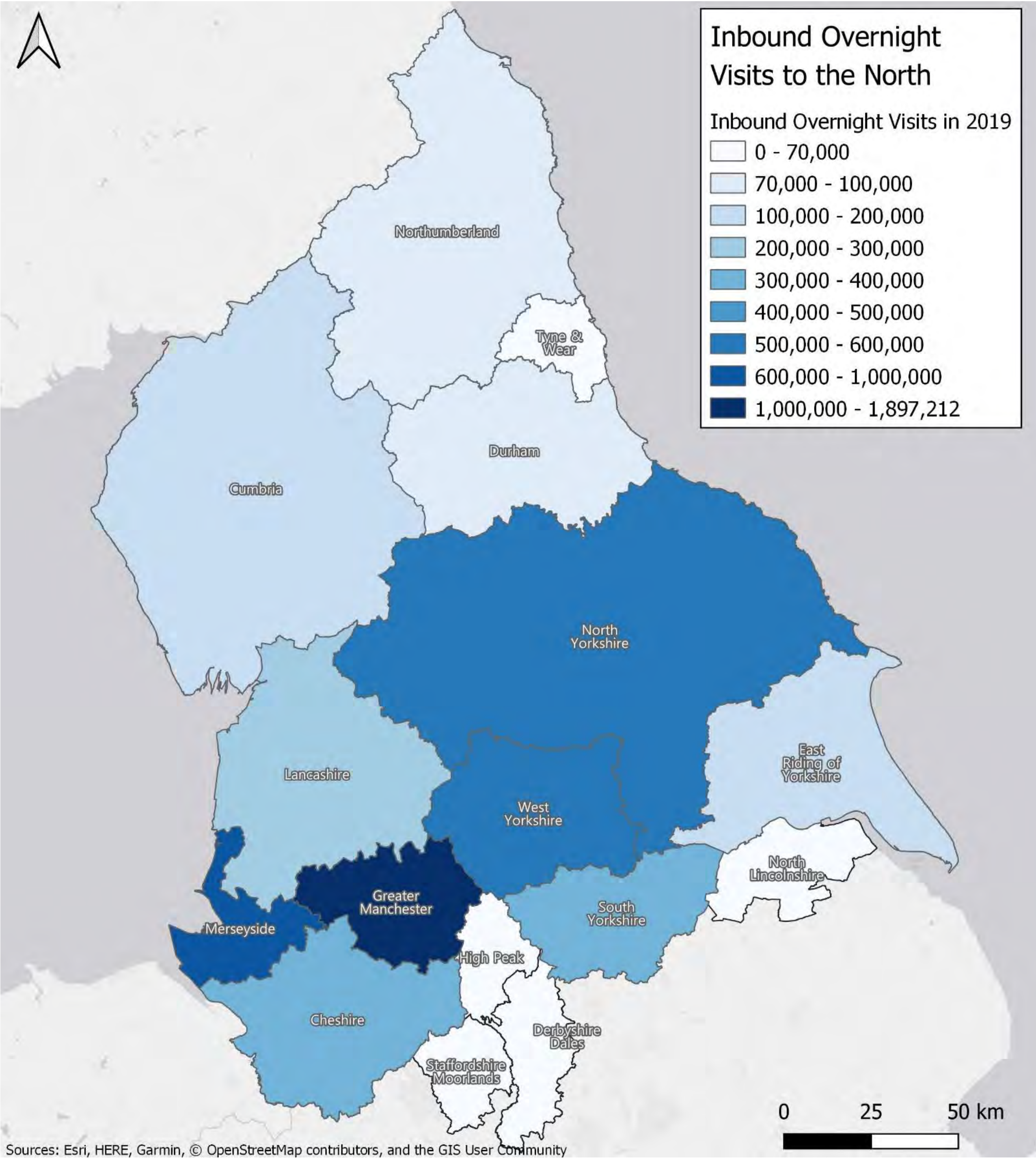
Rank	Town	International overnight visits (2019)
1	Manchester	1,661,000
2	Liverpool	845,000
3	Leeds	338,000
4	York	297,000
5	Newcastle-upon-Tyne	282,000
6	Cheshire Other towns	244,000
7	Manchester Other towns	236,000
8	Sheffield	177,000
9	West Yorkshire Other towns	108,000
10	Chester	95,000

Source: Visit Britain, IPS inbound (international) overnight tourism, 2019

Figure 3-13 - Month of visit by purpose for international visits (thousands)

Source: Rand Europe analysis of International Passenger Survey

Figure 3-14 - Map of the international overnight visits to Counties across the North



Source: Visit Britain, IPS inbound (international) overnight tourism, 2019

Rural/smaller towns

Although employment in the visitor economy is largely concentrated within the North's cities, rural areas and smaller towns are more dependent on the visitor economy as it plays a more dominant role in the economies of these places.

Market towns and villages attract a significant proportion of visitors overall, although taken individually the numbers of visitors in each of these places might be limited.

For instance, while the majority of visitors in the East Riding of Yorkshire went to Hull and Lincoln, other market towns, seaside towns and villages collectively accounted for more than 1 in 5 visitors to the county. This includes towns such as Bridlington, Beverley, Hornsea and Driffield.

Similarly, in Bradford, many touristic sites are located outside of the city. This includes Saltaire Village (a UNESCO World Heritage Site) located in the town of Shipley, the historic Keighley and Worth Valley Railway, and the Brontë Country, with the well-preserved village of Haworth.

These touristic spots are typically market and seaside towns that benefit from their cultural, architectural and historical heritage to attract visitors. Tourism plays a critical role to their local economy, with visitors spending on attractions, restaurants and shopping. In Saltaire, it was estimated that the average spend was £15.72 per head, mostly on food and shopping[1].

The strategy that these small places should adopt to sustain and further develop tourism is likely to be different to larger cities that attract a wider array of tourism forms and visitor profiles. In Bradford, day visitors accounted for 93% of all trips, with significantly smaller revenues from tourism as a result[2]. County Durham estimates the value of a day visitor to be £19.70, compared to £161.48 for a staying visitor.[3] Another critical element for small towns to address compared to larger cities is seasonality. This is particularly true for seaside towns, where off-season activities, events and marketing strategies must be developed[4].

[1] Bradford Metropolitan District, *Saltaire World Heritage Site business toolkit* (2016). Accessed at: saltaire-whs-business-toolkit.pdf (bradford.gov.uk)

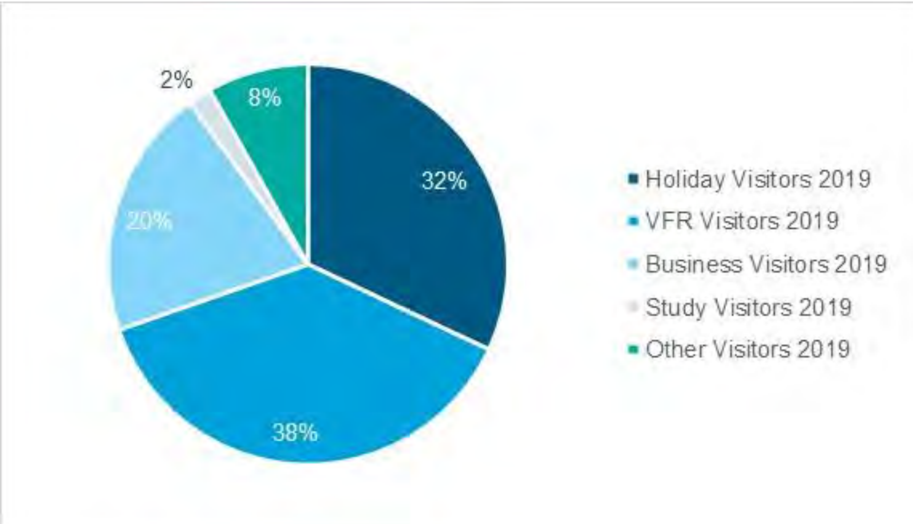
[2] Bradford Metropolitan District, *Bradford District Destination Management Plan* (2016). Accessed at: Bradford District - Destination Management Plan (Final - December 2016) (moderngov.co.uk)

[3] Visit County Durham, *Durham Tourism Management Plan* (2016). Accessed at: Layout 1 (visitcountydurham.org)

[4] North York Moors National Park, *Strategic destination plan for the North York Moors National Park* (2017). Accessed at: Destination plan for the North York Moors National Park

The data on international overnight visits provides a breakdown of the visit numbers by trip purpose. As shown in Figure 3-15, the main trip purpose of international overnight visits to the North is to visit friends or relatives (38%). The second most reported purpose for international overnight visits to the North is for a holiday (32% of visits). The share of business trip visits is also high in the North, 20% of international overnight visits to the North were for business purposes. Details on the groups included in 'Other Visitors' can be found in Appendix B.4.5.

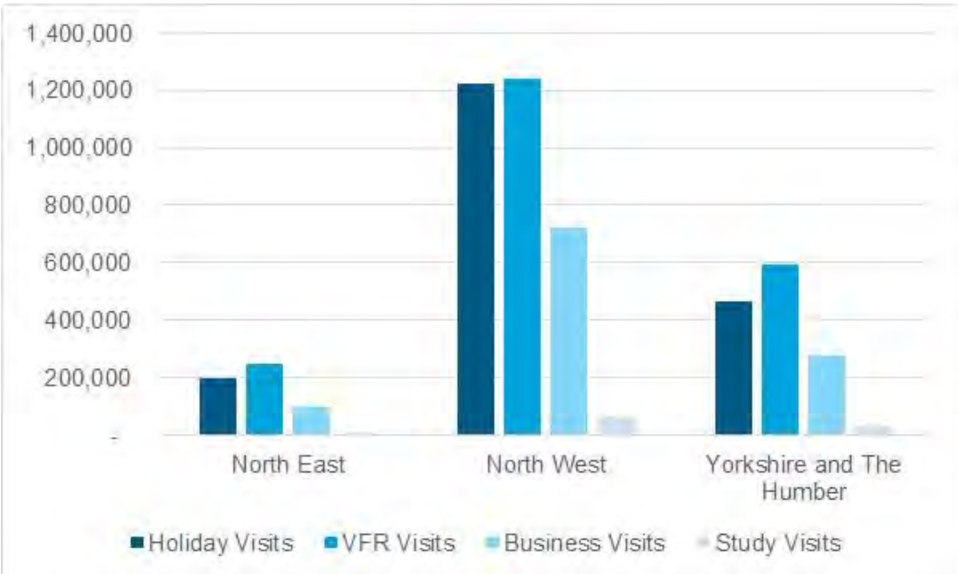
Figure 3-15 - Breakdown of the international overnight visitors to the North by trip purpose



Source: Visit Britain, IPS inbound (international) overnight tourism, 2019

Across the North, the primary reason for their visit stated by inbound overnight visitors is to visit friends and relatives. Figure 3-16 identifies the second most cited reason as holidays. Holiday visits make up a larger share of total visitors in the North West than the other two regions. The five local authorities with the highest numbers of international overnight holiday visit numbers in the North are Manchester (564,000), Liverpool (382,000), York (187,000), Newcastle-upon-Tyne (96,000), and Leeds (95,000). The average trip length for an international overnight visitor into the North of England is 6 nights.

Figure 3-16 - Main reason for visit amongst international overnight visitors to the North



3.3.1.3. Total visitors

The following section provides a high-level summary of the findings from the central demand side analysis. Table 3-4 summarises the total numbers of international visits (day and night) and the total number of domestic visits (day and night). This provides a helpful overview of total visitors but should be used with caution where there are limitations to summing the data, as highlighted above in section 3.3.1.1 there are data availability gaps for international day visits. The central analysis of visit volumes to the North finds a total of 420 million visits in 2019. The majority of the visits were made by domestic visitors (414 million).

Table 3-4 - Total visit numbers by region

Region	Total international visits	Total domestic visits	Total visits
North East	622,000	63,800,000	64,422,000
North West	3,992,000	187,770,000	191,761,000
Yorkshire and The Humber	1,757,000	147,920,000	149,677,000
North of England	6,394,000	413,518,000	419,912,000

Source: Visit Britain, IPS inbound (international) overnight and day tourism, 2019
Source: Visit Britain, GBTS Domestic overnight and day tourism by residents of Great Britain, 2019
**Figures may not sum due to rounding*
**Figures for the North of England total also include data on the midlands which represents the section of the Peak District that falls outside of the North of England*

The data on total visitor numbers has also been analysed at the Local Authority level, this data can be found in Appendix B.4. The largest receivers of total visitors are the North's largest cities, Manchester, Leeds, Liverpool, Sheffield, and Newcastle upon Tyne.

3.3.2. Profile of visitor spend

The following analysis breaks down the visitor spend by international and domestic visits, and by day and overnight visits. The data is based on questions in the GBTS and the IPS which ask the respondent for information on their spend while on their trip. This data has also been used to inform the demand side GVA estimates reported in section 4.3. The total visitor spend in the North in 2019 is an estimated £21.05 billion; this is a sum of all the available data on overnight, day, international and domestic visitors.

3.3.2.1. Day visitor spend

Domestic day visitor spend

Table 3-5 summarises the local authorities in the North with the highest domestic day visitor spend. The total spend of domestic day visitors to the North was £12.86 billion, the largest share was spent in Manchester (£1,512,549,000), followed by Leeds (£856,782,000), and Liverpool (£624,211,000).

Table 3-5 - Domestic day visitor spend (£) 2019

Rank	Local Authority	Top 10 local authorities in the North with the highest domestic day visitor spend (£) in 2019
1	Manchester	1,512,549,000
2	Leeds	856,782,000
3	Liverpool	624,211,000
4	Cheshire West and Chester	611,602,000
5	York	542,793,000
6	Sheffield	522,057,000
7	Newcastle upon Tyne	459,131,000
8	Blackpool	397,914,000
9	Scarborough	290,199,000
10	East Riding of Yorkshire	276,931,000

Source: Visit Britain, GBTS Domestic day tourism by residents of Great Britain, 2019

International day visitor spend

The data on International day visitors available for the scope of this project is limited, as detailed in section 3.3.1.1. There is no data available on the spend of international day visitors for the North. To estimate spend of international day visitors, international day visitor numbers have been multiplied by the spend per visit data for domestic day visits. From the data available the international day visitor spend in the North is around £40.2 million in 2019, however this data only captures a portion of the international day visits to the North. The largest amount of international day visitor spending in the North goes to York (£7,703,000).

Table 3-6 - International day visitor spend (£) 2019

Rank	Local Authority	Top 10 local authorities in the North with the highest international day visitor spend (£) in 2019
1	York	7,703,000
2	Manchester	7,342,000
3	Liverpool	6,437,000
4	Chester	3,661,000
5	Leeds	3,132,000
6	Blackpool	2,306,000
7	Newcastle	1,462,000
8	Scarborough	1,271,000
9	Sheffield	1,173,000
10	Newcastle-upon-Tyne	1,133,000

Source: Visit Britain, IPS inbound (international) day tourism, 2019

3.3.2.2. Overnight visitor spend

Domestic overnight visitor spend

Table 3-7 summarises the local authorities in the North with the highest domestic overnight visitor spend. The total spend of domestic overnight visits to the North was £5.38 billion, the largest share of this was spent in Manchester (£535,000,000), Liverpool (£379,000,000) and South Lakeland (£339,333,000).

Table 3-7 - Domestic overnight visitor spend (£) 2019

Rank	Local Authority	Top 10 local authorities in the North with the highest domestic overnight visitor spend (£) in 2019
1	Manchester	535,000,000
2	Liverpool	379,000,000
3	South Lakeland	339,333,000
4	York	289,667,000
5	Scarborough	278,000,000
6	Leeds	259,333,000
7	Blackpool	258,000,000
8	Northumberland	251,667,000
9	Newcastle upon Tyne	246,333,000
10	Allerdale	213,000,000

Source: Visit Britain, GBTS Domestic overnight tourism by residents of Great Britain, 2019

International overnight visitor spend

The data available for the scope of this project on the spend of international overnight visitors was limited, therefore the data on total spend of international overnight visits by Local Authority was estimated by multiplying international overnight visit numbers (at Local Authority level) by the spend per visit data (available only at the county level). The total spend of international overnight visits to the North is an estimated £2.77 billion, the largest shares being spent in Manchester (£745,332,000), Liverpool (£392,428,000) and Newcastle upon Tyne (£223,885,000).

Table 3-8 - International overnight visitor spend data (£) 2019

Rank	Towns	Top 10 Towns with the highest international overnight visitor spend (£) in the North
1	Manchester	745,332,000
2	Liverpool	392,428,000
3	Newcastle-upon-Tyne	223,885,000
4	Leeds	152,274,000
5	Sheffield	113,361,000
6	York	112,267,000
7	Manchester Other towns	105,845,000
8	Cheshire Other towns	74,834,000
9	Doncaster	55,495,000
10	West Yorkshire Other towns	48,835,000

Source: Visit Britain, IPS inbound (international) overnight tourism, 2019

The estimated total visitor spend across the North in 2019 was £21.05 billion. Table 4-4 summarises the total visitor spend across the North by region, the majority of which goes to the North West of England (£10.6bn), and Yorkshire and The Humber (£7.0bn).

National level analysis of impacts from the Covid-19 pandemic

Forecast Impacts

Visit Britain have produced a forecast for the impacts of the pandemic on inbound tourism in 2021, which anticipates 11.7 million visits, up 21% on 2020 but only 29% of the 2019 level; and £6.6 billion to be spent by inbound tourists, up 16% on 2020 but only 23% of the 2019 level. This is a significant downgrade from the original forecast for 2021, which was run in early December[109].

In 2019, domestic tourists spent £91.6 billion in the UK: £24.7 billion on overnight stays and £67 billion on day trips. VisitBritain forecasts that the domestic tourism spend will total £69.5 billion in 2020, a drop of around one-quarter on the previous year[110].

The ONS analysed quarterly trends of inbound passenger travel in 2020, in Quarter 2 of 2020 there were 96% fewer visits by inbound visitors. International passenger traffic at UK airports fell to 1.9% of its February 2020 levels in April, recovering to a peak of 36.7% in August before falling again in response to increased restrictions[111].

Turnover

Turnover in travel and tourism businesses fell to its lowest level in 2020 in May, at just 26.0% of February 2020 levels, compared with 73.6% in all other industries. Accommodation and travel agency businesses saw the sharpest decline in turnover during the first national lockdown, falling to 9.3% of their February 2020 levels in May 2020. In every sub-industry except exhibitions and conferences, there was a response to relaxing restrictions in the summer, with the turnover in food and beverage serving industries peaking at 90.0% of February 2020 levels in August 2020. [112]

Employment

According the ONS the group that experienced the largest fall in employment as a result of the Pandemic (in 2020) was in people aged 25 to 34 years working full-time in travel and tourism industries. Of the industries within travel and tourism, accommodation for visitors saw the largest percentage fall in employment (21.5%). Food and beverage serving activities saw smaller percentage falls, but this industry made up 40% of employment in travel and tourism in the three months to March 2020. [113]

GVA

There are significant differences in how different sectors across the UKs economy were affected, but those relevant to the visitor economy were the worst affected. The largest declines have been in the accommodation and food sector, with output 91% lower in April 2020 compared with February. Output in the arts and entertainment sector was 49% lower in May 2020 than in February 2020. In contrast, the financial sector saw just a 5% decline in April 2020.[114]

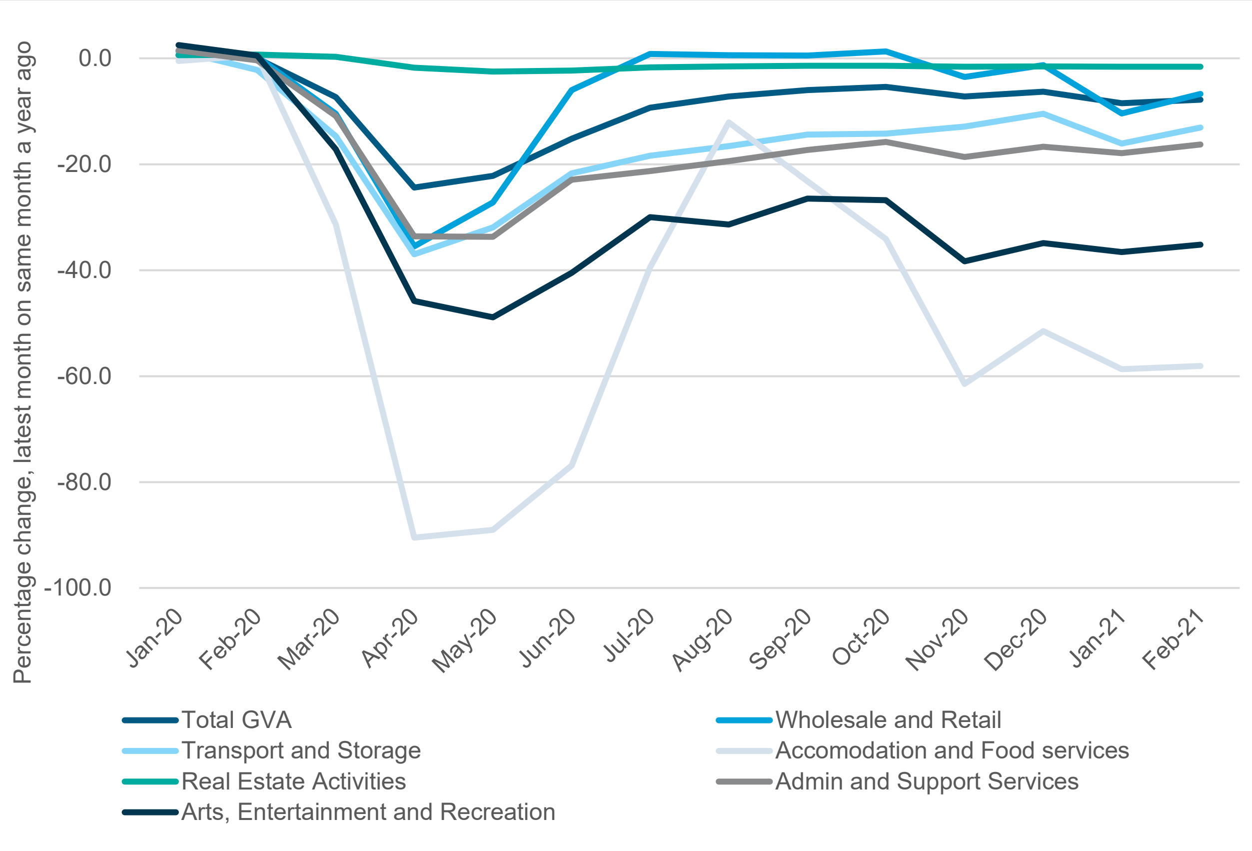
Business impacts

The Department for Culture, Media and Sport's Coronavirus Impact Business Survey found that tourism businesses had been impacted to a greater extent than other businesses. Specifically, the research found that[115]:

- 92% of tourism businesses said that their revenue had decreased by more than 50% with 68% saying that their business was generating no revenue at all.
- 62% for tourism businesses said that they would not be viable within 6 months even with existing Government support packages
- Only 31% of tourism businesses said they had accessed Government support.

[109] VB, 2021 tourism forecast, Jan 2021
[110] Parliament, Report on Impact of COVID-19 on DCMS sectors: First Report, 2020
[111] ONS, Coronavirus and the impact on the UK travel and tourism industry, Feb 2021
[112] ONS, Coronavirus and the impact on the UK travel and tourism industry, Feb 2021
[113] ONS, Coronavirus and the impact on the UK travel and tourism industry, Feb 2021
[114] ONS, Monthly gross domestic product by gross value added, April 2021
[115] DCMS, Coronavirus Impact Business Survey, June 2020.

Change in UK GDP from the latest month on same month a year ago, for specific sectors



In January 2021, output in the arts and entertainment sector fell sharply again and was 36% below its February 2020 level, while the accommodation and food sector fell by 68%. The wholesale and retail, and the transportation sectors also saw large falls in output in January. [116]

Indicators of Activity

Estimates for UK seated diner reservations on Saturday 24 April 2021 were at 62% of the level seen on the equivalent Saturday of 2019; this is a slight increase of 2 percentage points from the previous week but a substantial increase since Saturday 10 April 2021 (before restaurants and bars reopened) when its level was 0% (OpenTable).[117]

In the week to 24 April 2021, overall retail footfall in the UK was at 80% of its level in the equivalent week of 2019; footfall at retail parks continues to outperform that at shopping centres and high streets relative to its level in the same period of 2019 (Springboard).[118]

[116] ONS, Monthly gross domestic product by gross value added, April 2021
[117] ONS, Coronavirus and the latest indicators for the UK economy and society, 29 April 2021
[118] ONS, Coronavirus and the latest indicators for the UK economy and society, 29 April 2021

Impacts from the Covid-19 pandemic in the North

Similar trends and impacts from the Covid-19 pandemic have been experienced across the North. This section provides a snapshot of impacts identified from local data sources and research provided by the Project Steering Group and other project stakeholders.

Impacts of Covid-19 on Blackpool's Visitor Economy[119]

- Between March and December 2020, visits to Blackpool Town Centre fell by more than 35% of the equivalent period in 2019.
- Many Blackpool businesses have not survived with Pizza Express, WH Smith (containing the Post Office) and KFC all closing outlets.
- During the first lockdown, rail ridership plummeted to 5% of previous levels, recovering to a recent position of 20%.
- It is estimated there were 377,439 fewer rail journeys made to Blackpool between March and September 2020, the majority of which would have been made by visitors. This resulted in an estimated visitor expenditure loss of £37,743,900.
- Blackpool had one of the highest retail vacancy rates, at 26% in August 2020, rising further to 27% in May 2021 following the closure of Debenhams.

Impacts of Covid-19 on Peak District and Derbyshire

The following are findings from a tourism business survey undertaken in December 2020 by Marketing Peak District and Derbyshire[120]:

- Businesses expect revenues to fall by 58% over the next 6 months in comparison to the same period last year.
- On average businesses making redundancies expected to have to make 8% of their workforce redundant.
- 73% of businesses surveyed had experienced a reduction in visitors between March and December.
- Businesses experienced on average a 40% cancellation rate between 14th September and the 31st of December 2020.
- 9% of businesses have received no financial support to date.
- 23% of businesses interviewed stated that they would be unable to re-open their business

[119] *Visitor Insight Baseline Report Blackpool, March 2020 - 2021, with further information provided by Blackpool Council in June 2021*
[120] *Marketing Peak District and Derbyshire, Business Survey findings Tourism post-covid-19 recovery, March to December 2020*

However:

- A small number of businesses interviewed (13%) in fact reported that they had experienced an increase in demand between March and December
- 23% of businesses also reported an increase in domestic visitor numbers
- 76% of business have diversified their business offering during the pandemic

Impacts of Covid-19 on York

The pandemic has had a clear impact on York's visitor economy, where data from October 2020 already shows that large attractions received 67% fewer visitors in October 2020 than October 2019. Small attractions were hit harder with a decrease of 80% in visitors over the same period. Large attractions were still able to operate at a reduced capacity with pre-booked visits whereas many small attractions decided not to re-open in 2020 after the lockdown was lifted. This decrease in visitors was also reflected in the city centre footfall which was down by 38% over this period, and the footfall into the Visitor Information centre which fell by 77%.

Hotel room occupancy rates fell significantly from 82% in December 2019 to 29% in December 2020, representing a 67% decrease in hotel occupancy. Over this same period the number of hotel room nights in York fell from 85,148 to 9,806.

As well as the number of visitors declining, the behaviours of visitors to York also changed throughout the pandemic:

- Average spend of £60.95 per person per day in October (excluding accommodation), compared to £85.16 in September and £47.25 for August.
- Accommodation spend of £37.57 in October (per person per night), down from £45.54 in September
- More people are opting for self-catering options up to 22% in October from 6% in September
- Visitor life stage profile shifted significantly: 33% Post family (down from 67% in September) 29% Pre-family (30% in September) 18% Young family (up significantly from 3% in September)
- 81% of visitors are travelling to York by car (up from 61% in September), 12% of people chose to travel by train (down from 33% in September)
- 99% of visitors came from the UK, with 1% from overseas

4. Visitor Economy Importance and Value

4.1. Methodology

The secondary stage of analysis looks to understand the value of the North's visitor economy, this builds on the outputs of Section 3. This analysis translates the size of the North's visitor economy into the economic value of the North's visitor economy.

In order to capture an estimated range of the economic value of the North's visitor economy, two different methods of estimating its value have been utilised. The outputs of both methods are presented in GVA terms, as defined in section 3.1.

Supply side - The first method utilised to estimate the value of the North's visitor economy is a translation of employment to GVA. This is calculated using the GVA per worker approach.

Demand side - The second method utilised to calculate the value of the North's visitor economy is turnover to GVA approach, using total visitor spend data.

The two methods provide a range of potential values of the North's visitor economy. The range of values will both be summarised in terms of GVA. These outputs have been adjusted to 2019 prices to understand the visitor economy's value before the impacts of the Covid-19 pandemic.

The first two outputs are figures for direct impacts in GVA terms, these will represent the direct impact of the visitor economy from a supply side and a demand side perspective, allowing an estimated range to be presented.

The third output is an estimate of the additionality impacts that result from the North's visitor economy. This has been focussed on the demand side additionality to capture the indirect supply-chain value as a more defined approach to arriving at an indirect economic value of the visitor economy. Further, the visitor economy will also drive induced economic value through the expenditure of the sectors' employees' salaries, this is noted in section 3.3.2.

4.2. Supply-side economic value

Analysis has been undertaken to estimate the economic value of the supply side activity created by the North's visitor economy. For the supply side value analysis only the direct GVA impacts have been estimated. The outputs have been adjusted and are presented in 2019 prices (£). This analysis was undertaken at the Local Authority level, the following analysis summarises the regional, pan-northern level, and more detailed data at the Local Authority level.

4.2.1. Direct supply side GVA impacts

The supply side economic value of the North's visitor economy has been calculated using the employment outputs summarised in section 3.2.2. This section demonstrated a total of 579,000 people employed within the visitor economy (the SICs which make up the total visitor economy sector are detailed in section 3.1). A large share of the employment in the North is concentrated within the North West (49%) and then Yorkshire and The Humber (32%), while 16% is concentrated in the North East region.

Table 4-1 - Summary of regional employment in the visitor economy

Region	Total Employment in the visitor economy (2019)
North East	93,000
North West	286,000
Yorkshire and The Humber	184,000
North of England	579,000

**Figures may not sum due to rounding*
**Figures for the North of England total also include data on the midlands which represents the section of the Peak District that falls outside of the North of England*
Source: Atkins calculations, 2021, using Nomis, BRES employment data, 2019 and ONS GVA data, 2017

The direct supply side GVA impacts have been calculated by multiplying the employment numbers by attributable GVA[121] per workforce job, for the corresponding SIC and locale using the formula:

$$\frac{\textit{Sectoral GVA * Proportion of GVA attributable to workforce}}{\textit{Sectoral workforce jobs}}$$

Attributable GVA figures were calculated at the NUTS 2 level and for the broad SIC codes relevant for this analysis. The sector wide workforce jobs measure is sourced from BRES employment data (2017) to calculate sector GVA per worker, aligning with the ONS Regional GVA data.

The direct employment of the visitor economy in the North, adjusted for the level of part-time workers, has been disaggregated by sector and location and the adjusted attributable GVA per job has been applied.

This analysis leads to an estimated direct supply side GVA impact value for the visitor economy in the North of **£9.35 billion** as summarised in Table 4-2 by region and sector.

Table 4-2 - Estimated direct GVA impact value for the visitor economy by region (£) 2019

Region	Estimated direct GVA impact value (£) 2019
North East	1,315,197,000
North West	5,207,148,000
Yorkshire and The Humber	2,579,928,000
North of England	9,353,555,000

**Figures may not sum due to rounding*
**Figures for the North of England total also include data on the midlands which represents the section of the Peak District that falls outside of the North of England*
Source: Atkins calculations, 2021, using Nomis, BRES employment data, 2019 and ONS GVA data, 2017

The visitor economy in the North is essential for the job market and GVA contribution with a direct job creation of 579,000 roles and a direct supply side GVA contribution of £9.35 billion. This equates to roughly £32,000 GVA per direct full-time employee.

The nature of the jobs in the visitor economy means that a large share of them are part-time roles, although these roles have smaller impacts in GVA terms than those of a full time role, they are highly valuable to those who are less likely or able to take up full time employment. The jobs often provide local, flexible employment to residents.

At a sub-regional level (as shown in Table 4-3), the direct GVA impacts are largest in Manchester Local Authority where almost 36,900 jobs are located.

The direct GVA impacts are also significant in Liverpool, Leeds and Cheshire West and East.

[121] **Attributable GVA** is the share of GVA which is attributable to the workforce, this is the numerator for the calculation of GVA per Workforce Job. Attributable GVA is calculated using the ONS Regional GVA (income approach) data which provides GVA subcomponents: Compensation of employees (CoE), Taxes, Subsidies and Rental Income. Attributable GVA includes: *CoE + (GOS/MI – rental income) + (Proportion of rental income to GVA * taxes less subsidies)*

Table 4-3 - Distribution of direct GVA by Local Authority (£) 2019

Rank	Local Authority	Top 20 LAs with the highest direct supply side GVA in the North (£) 2019
1	Manchester	788,525,000
2	Liverpool	458,953,000
3	Leeds	442,998,000
4	Cheshire West and Chester	319,164,000
5	Cheshire East	299,607,000
6	Newcastle upon Tyne	279,371,000
7	Sheffield	263,772,000
8	South Lakeland	231,214,000
9	County Durham	207,871,000
10	Trafford	206,859,000
11	York	204,839,000
12	Blackpool	180,367,000
13	Northumberland	180,305,000
14	Salford	171,756,000
15	Bradford	169,621,000
16	Warrington	165,568,000
17	Wigan	158,658,000
18	Stockport	154,713,000
19	Harrogate	149,313,000
20	Kirklees	145,913,000

Source: Atkins calculations, 2021, using Nomis, BRES employment data, 2019 and ONS GVA data, 2017
**presented in 2019 prices*

4.2.2. Indirect and induced economic value

The analysis in section 4.2.1 summarises the direct value created by the North's visitor economy derived from the supply side analysis of employment. This analysis does not factor in any additionality impacts that occur along the supply chain of the sector. However, it is important to note that when employees in the North's Visitor sector spend their salary it has additional beneficial economic impacts, some of which will remain local, identified as 'induced economic value'. The businesses in the North's visitor sector will also produce additional economic benefits through its supply chain, which enable businesses to provide their goods and services in the visitor economy. Again, a share of this supply chain value will be captured locally and be an additional benefit from the North's visitor economy. These impacts would be additional to the direct GVA impacts, once additionality factors of leakage and displacement are accounted for.

The valuation of the visitor economy as demand and supply side are alternative methods to arrive at such an estimate for the visitor economy. Section 4.2.1 provides estimates for indirect value from the demand side additionality, as the net total GVA impacts, which is a method to capture the same outcome as an analysis of the additionality of the supply side position would.

4.3. Demand-side economic value

Analysis has been undertaken to estimate the economic value of the demand side activity created by the North's visitor economy. This presents an alternative view to the supply-side analysis to provide confidence in the estimated range for the economic value of the visitor economy.

For the demand side value analysis both the direct GVA impacts and the indirect GVA impacts have been estimated. The outputs have also been adjusted and are presented in 2019 prices (£). The following analysis will summarise the regional and pan northern level, however the analysis was undertaken at the Local Authority level, more detailed data at the Local Authority level can be found in Appendix B.4.

4.3.1. Direct demand side GVA impacts

The demand side economic value of the North's visitor economy has been calculated using visitor spend data outputs summarised in section 3.3.2. This section summarises a total visitor spend of £21.05 billion across the North in 2019. Table 4-4 summarises the total visitor spend across the North by region, the majority of which goes to the North West of England (£10.6bn), and Yorkshire and The Humber (£7.0bn).

Table 4-4 - Total spend of all visitors (£) 2019

Region	Total Spend (£) of all visitors in the North 2019
North East	2,777,682,000
North West	10,610,530,000
Yorkshire and The Humber	7,039,337,000
North of England	21,053,095,000

Source: Visit Britain, GBTS Domestic overnight tourism by residents of Great Britain, 2019;

Visit Britain, IPS inbound (international) overnight tourism, 2019

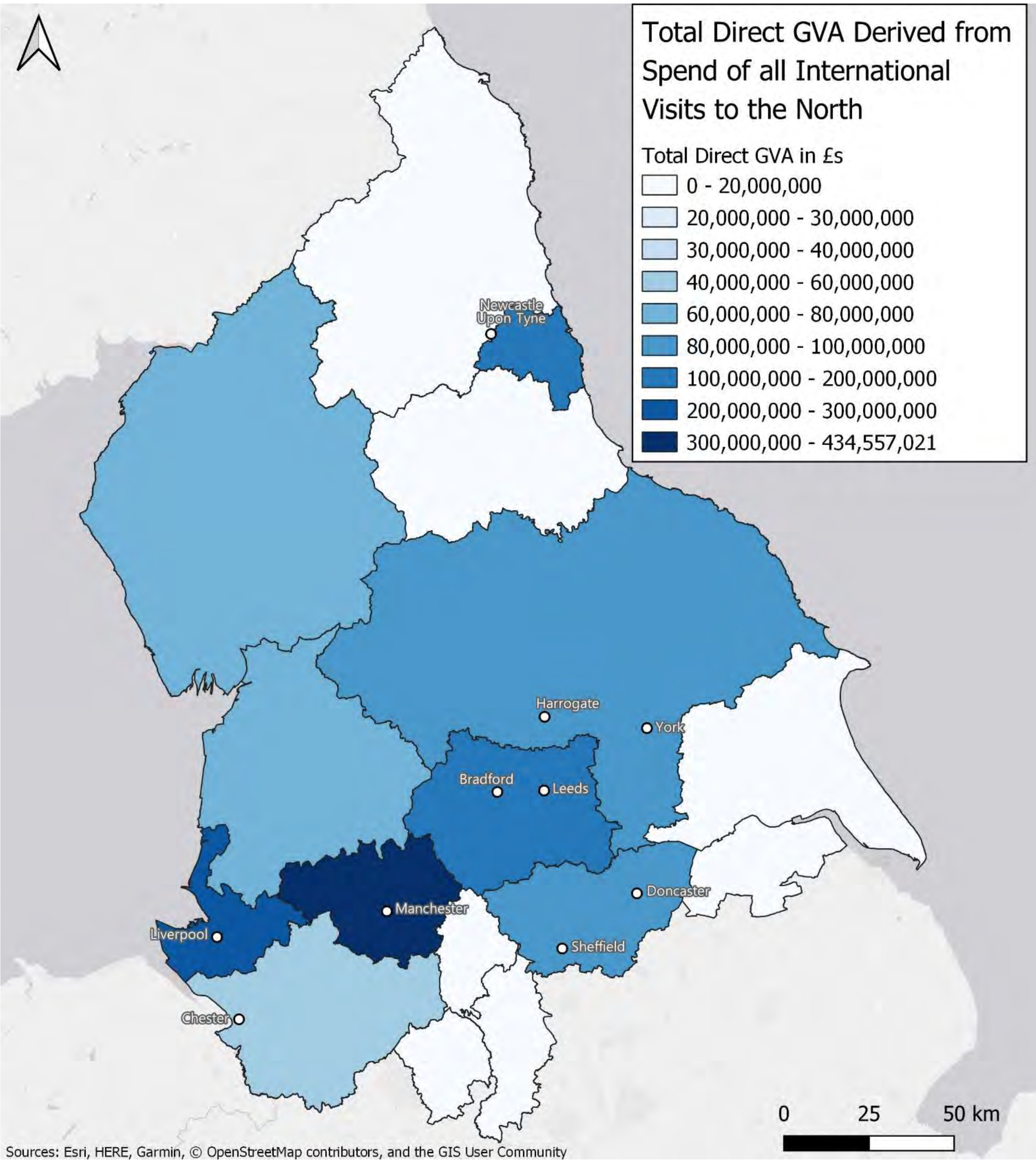
**Figures may not sum due to rounding*
**Figures for the North of England total also include data on the midlands which represents the section of the Peak District that falls outside of the North of England*

The direct demand side GVA impacts have been calculated by multiplying total visitor spend by a GVA to Turnover ratio. This is based on the assumption that visitor spend roughly translates to turnover in the sector. The turnover to GVA ratio was determined using the available ONS Annual Business Survey data on turnover for the SIC codes that capture the visitor economy (refer to the methodology in 3.1).

The direct demand side GVA impacts were calculated by Local Authority, for international, domestic and total visits. There are, however, limitations to some of the spend data as is detailed in section 3.3.2. Most, but not all visitor spend has been captured in the available data. As the direct demand side GVA calculation is based on this spend data it also estimates most, but not all of the GVA impacts of the visitor economy in the North.

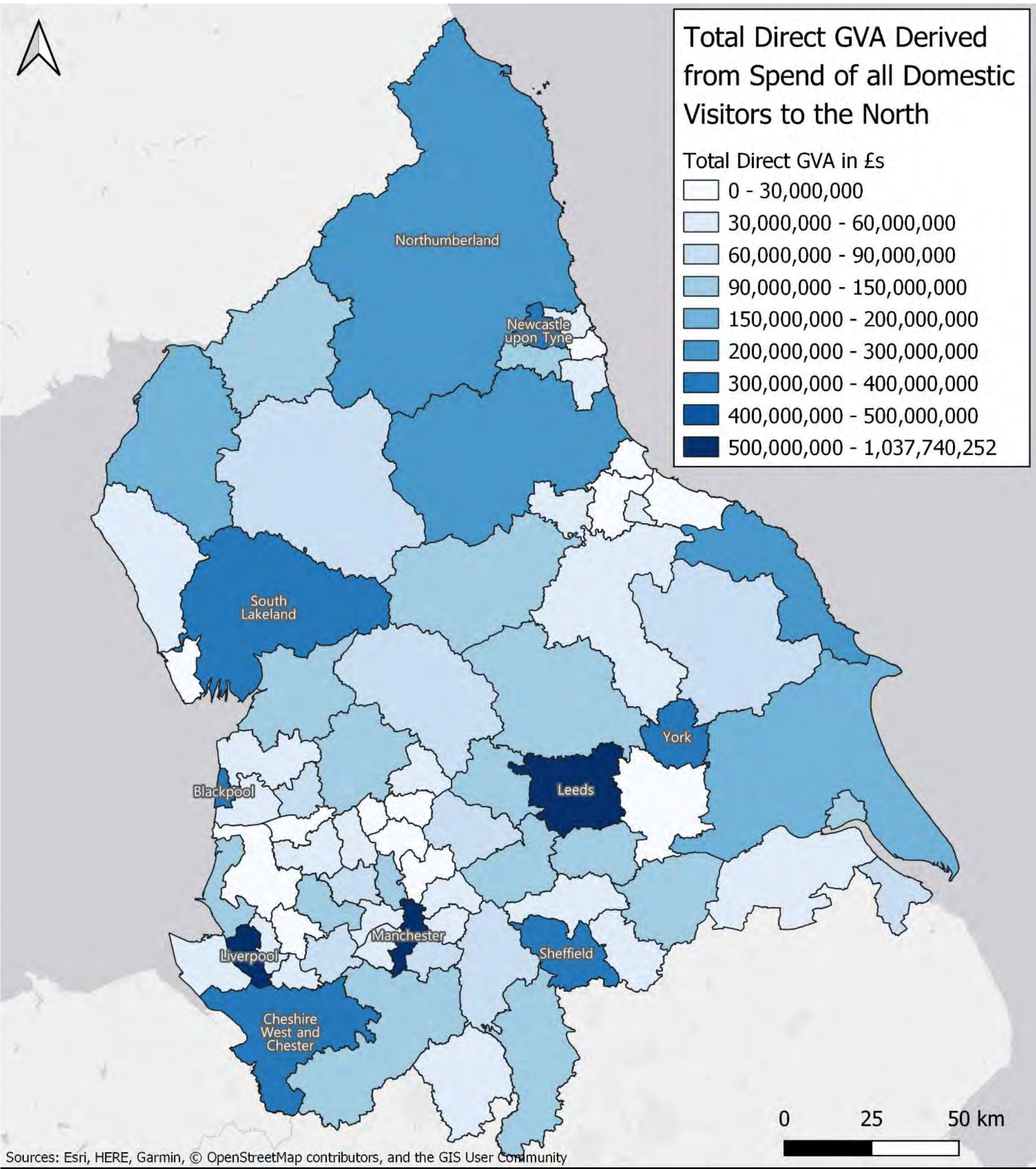
The direct demand side GVA impacts created by the spend of all international visits in 2019 are summarised by county in Figure 4-1, where the top 10 towns with the largest direct GVA impacts from international visits have been labelled. This map emphasises the scale of impact the North's cities have on the North's visitor economy, where the counties with the largest direct demand side GVA are those of the North's main cities.

Figure 4-1 - Total Direct GVA derived from spend of all international visits, (£) 2019



Source: Visit Britain, IPS inbound (international) overnight and day tourism, 2019

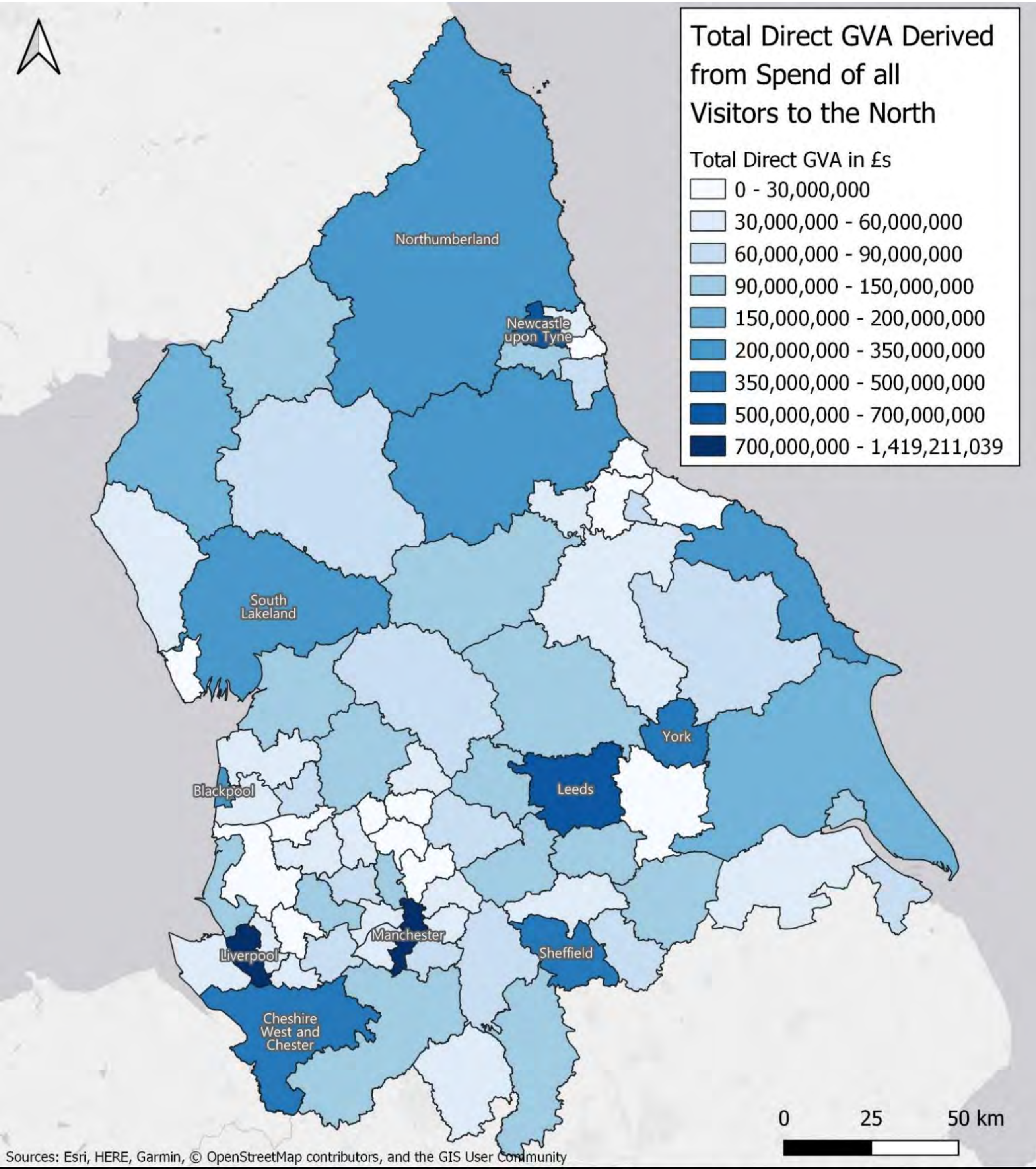
Figure 4-2 - Total Direct GVA derived from spend of all domestic visits, (£) 2019



Source: Visit Britain, GBTS Domestic overnight and day tourism by residents of Great Britain, 2019

The direct demand side GVA impacts created by the spend of all domestic visits in 2019 by Local Authority are summarised in Figure 4-2, where the top 10 local authorities with the largest direct GVA impacts from domestic visits have been labelled. Congruent to the GVA impacts of international visitors, the larger cities in the North have the largest direct demand side GVA impacts. However, the local authorities in Durham and Northumberland have relatively large direct GVA impacts resulting from domestic visitor spend, these destinations are more popular with domestic visitors than international visitors.

Figure 4-3 - Total Direct GVA derived from spend of all visits, (£) 2019



Source: Visit Britain, GBTS Domestic overnight and day tourism by residents of Great Britain, 2019

Source: Visit Britain, IPS inbound (international) overnight and day tourism, 2019

The direct demand side GVA impacts of total visits to the North is summarised by Local Authority in Figure 4-3, where the top 10 local authorities with the largest direct GVA impacts from total visits have been labelled. The total direct demand side GVA impact is £10.48 billion (2019). The majority of visits to the North are made by domestic visitors, therefore this map largely reflects the patterns seen in Figure 4-2. In terms of total direct demand side GVA impacts the largest benefactors are Manchester (£1,419,211,000), Liverpool (£710,601,000), Leeds (£591,159,000), Newcastle upon Tyne (£500,564,000) and York (£442,807,000).

4.3.2. Indirect Economic Value - Supply chain

The analysis thus far is the direct value created by the North's visitor economy through the supply and demand side as alternative perspectives and methods. The following analysis estimates the total net GVA, capturing additionality arising from the direct demand side GVA. (section 4.3.1). The analysis estimates indirect economic value, but does not calculate induced impacts. However, it is important to recognise that induced impacts do arise as a result of the activity in the visitor economy.

Indirect multiplier impacts are those that occur along the supply chain linkages, resulting from activity and expenditure in the sector.

Induced multiplier impacts are those associated with expenditure that results from those who derive their incomes from the direct and supply linkages of the sector, such as employee salaries and business owner compensation[122].

The indirect value of the North's visitor economy has been estimated by applying a weighted average of the sectoral output multipliers for the relevant SICs in the visitor economy, taken from the ONS's input-output tables (2016 output and GVA multipliers). This multiplier was 1.57, meaning that £1 of direct activity in the visitor economy drives an additional £0.57 in economic value through the supply chain as composed of both the visitor economy sectors and other economic sectors. Displacement, substitution, and leakage have also been applied according to the HCA additionality guide's (2014) ready reckoners.

Leakage regards the proportion of outputs that benefit those outside of the target area or group.

Displacement regards the proportion of outputs accounted for by reduced outputs elsewhere in the area. For example, a job which hires construction workers who would have otherwise been hired on another project.

Substitution has not been deemed to be relevant for this assessment, as this refers to the impact of public sector assistance on activity levels.

It has been assumed that no displacement occurs (0%), there may be some minor displacement in visitor spend from smaller cities and towns to the larger cities and towns which receive high visitor numbers. However, the net effect is likely to be small across the North, which reflects the pan-Northern region. Further, day visitors often travel to nearby visitor attractions, with an average 45 miles travelled by a domestic day visitor in the North.

A medium level of leakage (25%) has been assumed. Some of the spending in larger businesses and their supply chains may leak out of the North. The majority of businesses in the sector are SMEs, but some of the larger businesses will receive a large proportion of spend. Some of the revenue from these businesses will go into the North through labour and rent costs for example, but some of the profits will leak out in advance of their supply chain expenditure, being spread across the UK and internationally.

Table 4-5 summarises the Total Net GVA impacts of the North's visitor economy after accounting for additionality and multiplier factors to capture the indirect economic value. The Total direct and indirect demand side GVA impact of the visitor economy in the North is £16.44 billion (2019). This is before accounting for Leakage, Displacement and Substitution. The Total Net GVA impact of the visitor economy in the North is £12.33 billion (2019). More detailed outputs for Net total GVA are available in Table 4-5. This is after accounting for Leakage, Displacement and Substitution.

Table 4-5 - Total Net GVA impacts of the North's Visitor Economy

Region	Direct GVA Value	Direct and Indirect Total GVA	Net Total GVA
North East	1,493,758,000	2,344,239,000	1,758,179,000
North West	5,377,635,000	8,439,424,000	6,329,568,000
Yorkshire and The Humber	3,272,751,000	5,136,112,000	3,852,084,000
North of England	10,475,364,000	16,439,577,000	12,329,683,000

Source: Atkins calculations, using HCA guidance
Visit Britain, GBTS Domestic overnight and day tourism by residents of Great Britain, 2019
Visit Britain, IPS inbound (international) overnight and day tourism, 2019
**Figures may not sum due to rounding*
**Figures for the North of England total also include data on the midlands which represents the section of the Peak District that falls outside of the North of England*

[122] HCA, Additionality Guide Fourth Edition, 2014

4.3.3. Summary of value estimates

1. The total direct supply side GVA contribution of the North's Visitor Economy is **£9.35 Billion** (2019).
2. The total direct demand side GVA impact of the North's Visitor Economy is **£10.48 Billion** (2019).
3. The Total direct and indirect demand side GVA impact of the Visitor Economy in the North is **£16.44 Billion** (2019).
4. The Total Net GVA impact of the Visitor Economy in the North is **£12.33 Billion** (2019).

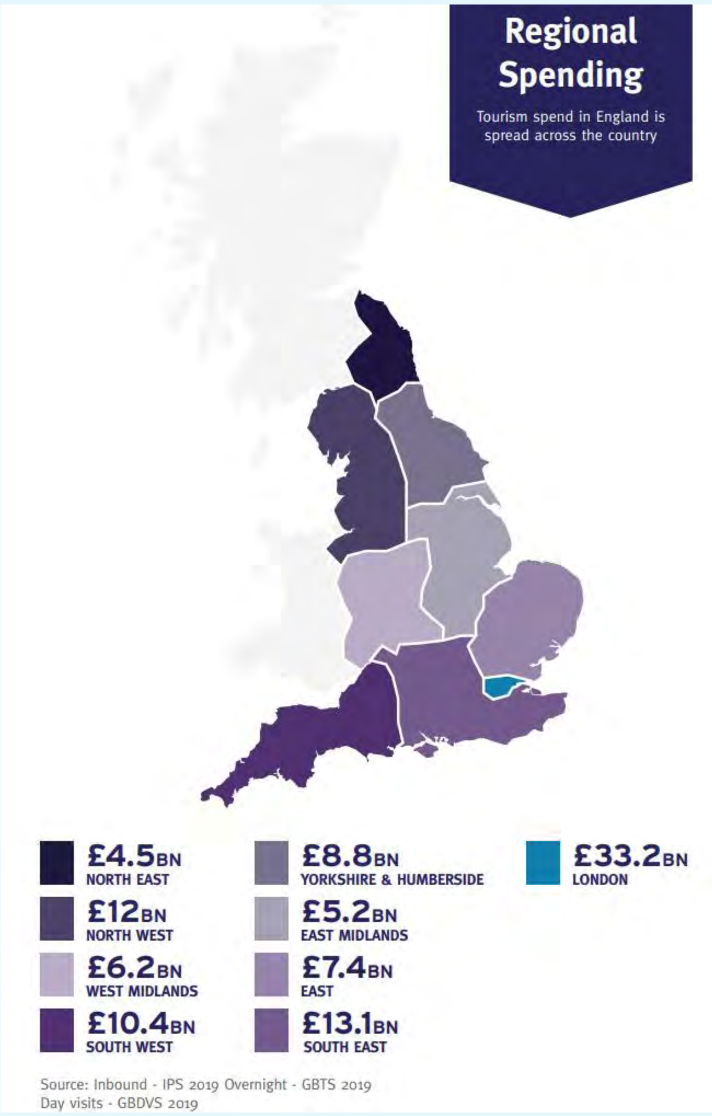
Comparison between the North's visitor economy and other regions and nations

Approximately 8% of total employment in the North of England is in the visitor economy, this is slightly lower than the England average of 9%[123]. Approximately 7% of the North of England's businesses are in the Visitor Economy, which is in line with the England average[124].

Merseytravel have previously estimated that the North receives 29% of all domestic overnight trips in England, but just 14% of all overseas overnight trips, which suggests a strong domestic offering and the potential for growth in the North's offering to overseas visitors[125].

Over 80% of England's visitor economy is made up of the tourism sector[126]. Visit Britain estimate that the direct GVA contribution of England's tourism economy is valued at £48bn, with approximately 1.4 million jobs directly supported[127]. Figure 4-4 shows that of the £100.8bn tourism spending across the UK 5% was spent in the North East, 12% in the North West and 9% in Yorkshire and Humberside. In total, tourism spending in the North is estimated to make up 25% of England's tourism spending, and 37% of England's tourism spending when excluding London.

Figure 4-4 - Regional tourism spending across England's regions

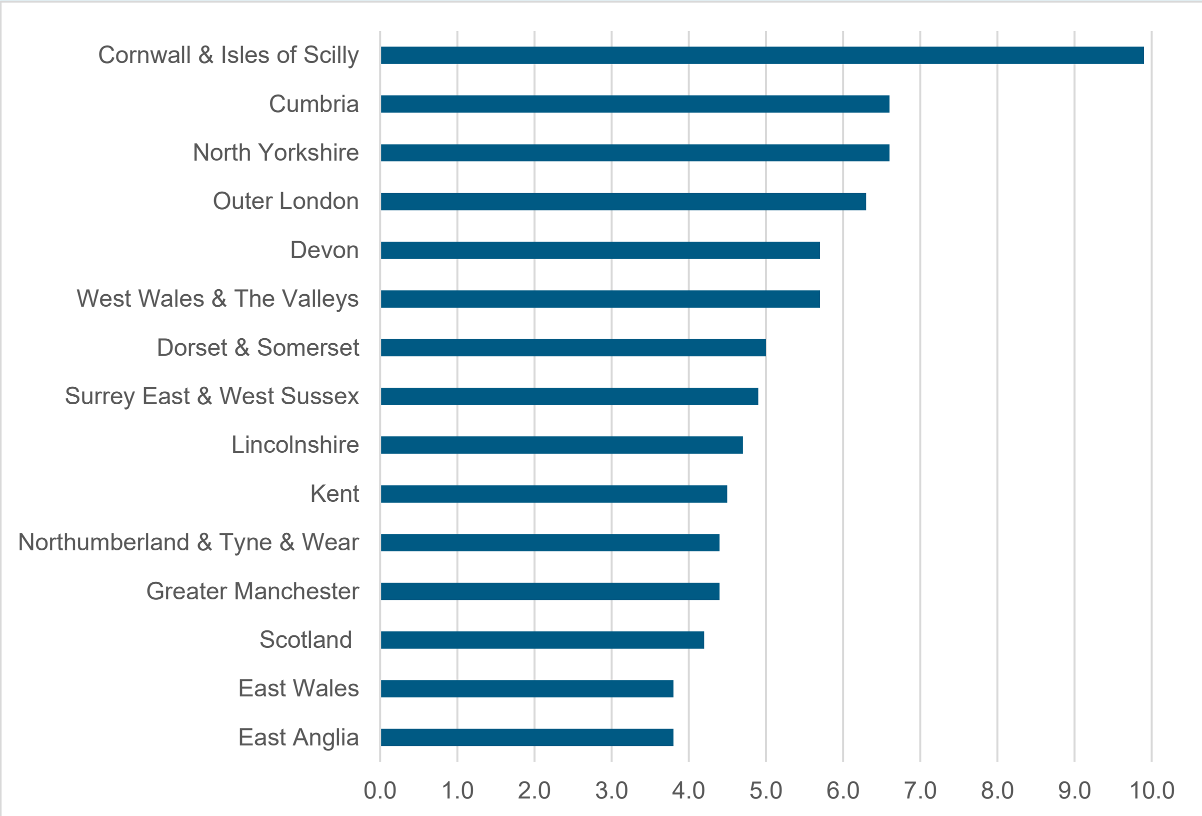


[123] Atkins calculations using Nomis, BRES (2019)
[124] Atkins calculations using Nomis, Business Counts (2019)
[125] Merseyside Travel, Visitor Economy and Transport Demand in the North of England, 2018
[126] The value of tourism in England | VisitBritain
[127] *Visit Britain, Tourism in England Fact Sheet, 2019*

The North of England's 25% share of England's total tourism spending indicates that it is a key destination for tourism in England, with the North West region driving activity in the sector. The North's strengths are in domestic tourism as it has previously been estimated that the North of England receives only 14% of international visitors to England [128].

In 2016, the ONS undertook research on the relative importance of the visitor economy to different regions in the UK[129]. As part of this work, they calculated a tourism ratio for each region or sub-region. This statistic is the result of dividing the total demand within an area (or visitor expenditure) by the total supply (or output of all industries) in each region. Figure 4-5 shows the relative importance of the visitor economy to the 15 places with the highest shares of output in the visitor economy as a share of total output, where Cumbria and North Yorkshire rank second and third.

Figure 4-5 - Share of total output attributable to the Visitor Economy (%)



[128] Merseyside Travel, Visitor Economy and Transport Demand in the North of England, 2018
[129] https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/theregionalvalueoftourismintheuk/2013

4.4. Conclusion

Visitor Economy Profile - Supply side

- The North is rich with a large array of natural, historical and leisure assets including national parks, areas of outstanding natural beauty, museums of national importance, world renowned UNESCO World Heritage Sites and a range of other assets.
- There are roughly 39,000 businesses in the visitor sector across the North. The majority of these businesses are concentrated in the North's cities. The local authorities of Scarborough, South Lakeland, Blackpool and York have the highest shares of visitor related businesses as a proportion of total businesses in the North. The majority of businesses in the North's visitor economy operate in food and beverage, accommodation, and creative arts and entertainment sub-sectors.
- There are approximately 579,000 people in employment in the visitor sector across the North. The majority of this employment is concentrated in the North's larger cities. The local authorities of South Lakeland, Scarborough, Staffordshire Moorlands and Derbyshire Dales have the highest shares of visitor related employment as a proportion of total employment in the North. The majority of employment in the visitor economy of the North is in the food and beverage, accommodation, and sports activities and amusement and recreation sub-sectors.

Visitor Economy Profile - Demand side

- The North receives a total of 420 million visits a year. The majority of the visits are made by domestic visitors – there were 414 million domestic visits to the North in 2019 and 6 million international visits.
- The total number of domestic day visits received by the North of England in 2019 was 384.5 million. The top four largest receivers of domestic day visits were four of the North's main cities, Manchester, Leeds, Liverpool, and Sheffield.
- The top two largest receivers of international day visitors were two of the North's main cities, Liverpool and Manchester.
- In 2019, the North of England received a total number of 28.9 million domestic overnight visits. The top three largest receivers of domestic overnight visits were three of the North's main cities, Manchester, Liverpool and Leeds. South Lakeland, York and Scarborough are the next 3 largest receivers of domestic overnight visits.
- The total number of international overnight visits received by the North of England in 2019 was 5.6 million. The top three receivers of international overnight visits are three of the North's main cities, Manchester, Liverpool and Leeds.
- The main activity of visitors to the North is visiting friends or family. Going out for a meal is the second most common reason people make a day trip to the North of England. Other common activities include a "general day out", outdoor activities and going for a night out.

Visitor Economy Value

- The following are the key outputs from the value analysis of the North's visitor economy:
  - There was a total visitor spend of £21.05 billion across the North in 2019.
  - Direct GVA contribution of the North's visitor economy is estimated at £9.35 billion to £10.48 billion (2019).
  - The total net GVA contribution of the North visitor economy, reflecting indirect economic value and additionality, is estimated at £12.33 billion.
- This will likely underestimate the total net GVA contribution, as induced value has not been included.
- The above estimates are generally in line with the outputs of previous research into the size and value of the UK and North of England's Visitor Economies, including analysis by Deloitte and Oxford Economics, and Merseytravel and TfN[130,131].

[130] Deloitte and Oxford Economics, Tourism, jobs and growth - The economic contribution of the tourism economy in the UK, 2013
[131] TFN, Visitor Economy and Transport Demand in the North of England, 2018

5. Visitor Economy Transport Profile

5.1. Methodology

The following chapter explores the relationship between the North's visitor economy and transport networks in order to develop an understanding of how and where visitors are travelling across the North of England. The analysis presented in this chapter explores the transport demand generated by both domestic and international visitors to the North of England, and explores the modes visitors use to travel to, from and within the North, and identifies some of the main visitor flows. A range of data sources are used throughout this chapter:

- National Travel Survey 2019, accessed via gov.uk
- National Travel Survey 2015-2019 Analytical Outputs produced by Transport for the North, sourced from Department for Transport National Travel Survey 2002-2019: Special Licence Access, available from UK Data Service
- National Rail Passenger Survey Spring 2019, accessed via Transport Focus Data Hub
- Tram Passenger Survey 2018, accessed via Transport Focus Data Hub
- International Passenger Survey 2017-2019, outputs taken from work undertaken by Rand Europe as part of TfN's Visitor Economy Modelling and Appraisal commission
- Civil Aviation Authority Departing Passenger Survey Data (2017 and 2018), provided by Transport for the North, originally sourced from Department for Transport

5.1.1. Data Limitations

The following are the main limitations of the data:

- The journey purpose categorisations utilised within the National Travel Survey and Transport Focus datasets do not exactly map onto this study's definition of the visitor economy. Therefore, the journey purpose categorisations which most closely align have been used
- National Travel Survey data was only available at county or combined authority level, as opposed to Local Authority level which is used elsewhere in this report
- Transport Focus data is reported by transport operator, and therefore does not precisely map onto this project's study area for the majority of operators
- In order to ensure a sufficient sample size, analysis of the National Travel Survey at county/combined authority geographic scale has been undertaken using a combined 2015-2019 dataset. Despite this, selected counties have been excluded from analysis due to insufficient sample size
- National Travel Survey data is self-reported via travel diaries and interviews, meaning respondents may not accurately report all journeys. The data has been weighted in line with the guidance supplied alongside the dataset to attempt to overcome this issue
- Widespread disruption to rail services occurred across the North of England following the May 2018 timetable change, the impact of this disruption will be reflected within some of the data presented within this report
- Journeys to the North from Northern Ireland were not able to be considered in detail as part of this study, as none of the datasets on visitor travel specifically include data on visitor trips from Northern Ireland, the Channel Islands or the Isle of Man to the North.

5.2. Overarching Domestic Travel Patterns in the North of England

The following section presents some high-level insights into selected journeys undertaken across the North of England drawn from analysis of the 2018/19 regional level National Travel Survey (NTS) data, Transport Focus survey data, and Rand Europe analysis of domestic visits data.

5.2.1. Trip Purpose, Mode, Distance and Length

Figure 5-1 - Trips Per Person, Per Year – by Journey Purpose and Origin Region

Figure 5-1 shows the number of trips per person per year by region. These have been split into trip purpose classifications which most closely map onto this project's definition of the visitor economy. The number of business trips is slightly lower in the North compared to England as a whole, although the North West only has 1 trip less per year for business than the rest of England. The North East records a higher number of trips across several purpose classifications, including shopping, visiting friends at home or elsewhere, holidays / day trips and other trips. Residents of the North West tend to make fewer trips than residents of other parts of the North, and England as a whole. In particular, trips for holidays and visits to friends at home or elsewhere are noticeably lower. Yorkshire and The Humber tends to be in line with England figures. The noticeable exceptions are a higher number of trips for shopping, and a lower number for Sport / Entertainment.

Figure 5-2 - Trips Per Person, Per Year – by Main Mode

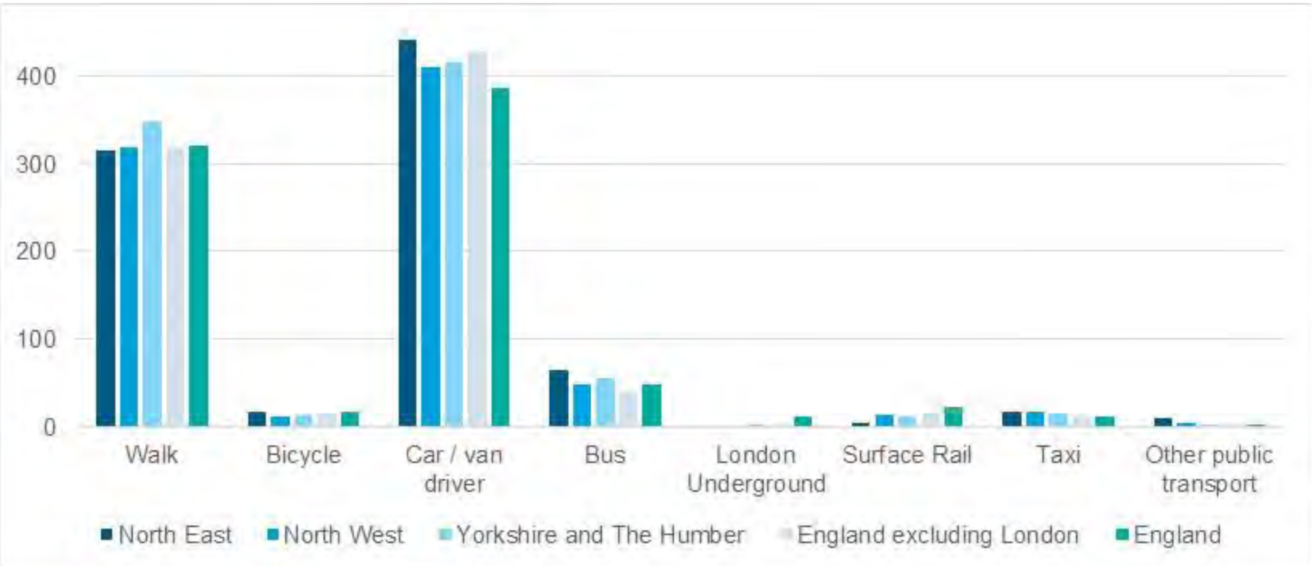


Figure 5-2 outlines the number of trips per person, per year, by main mode and region. The most popular modes are car/van as a driver, and walking. The North West and Yorkshire and The Humber both record a lower number of car/van trips in comparison to *England excluding London*. In contrast to this, the North East records a higher number of car/van trips, with residents of this region making over 30 more car trips each year than residents of the North West. For walking trips, residents of the North East and North West both make a similar number of trips to the *England* and *England excluding London* average. The exception to this is Yorkshire and the Humber, where approximately 30 more walking trips are made each year. Across the North, journeys by train are taken much less frequently than average across both *England* and *England excluding London*. Of the three regions of the North, residents of the North West make the most journeys by train, while residents of the North East make the fewest rail journeys.

Figure 5-3 - Average Trip Length (Miles)

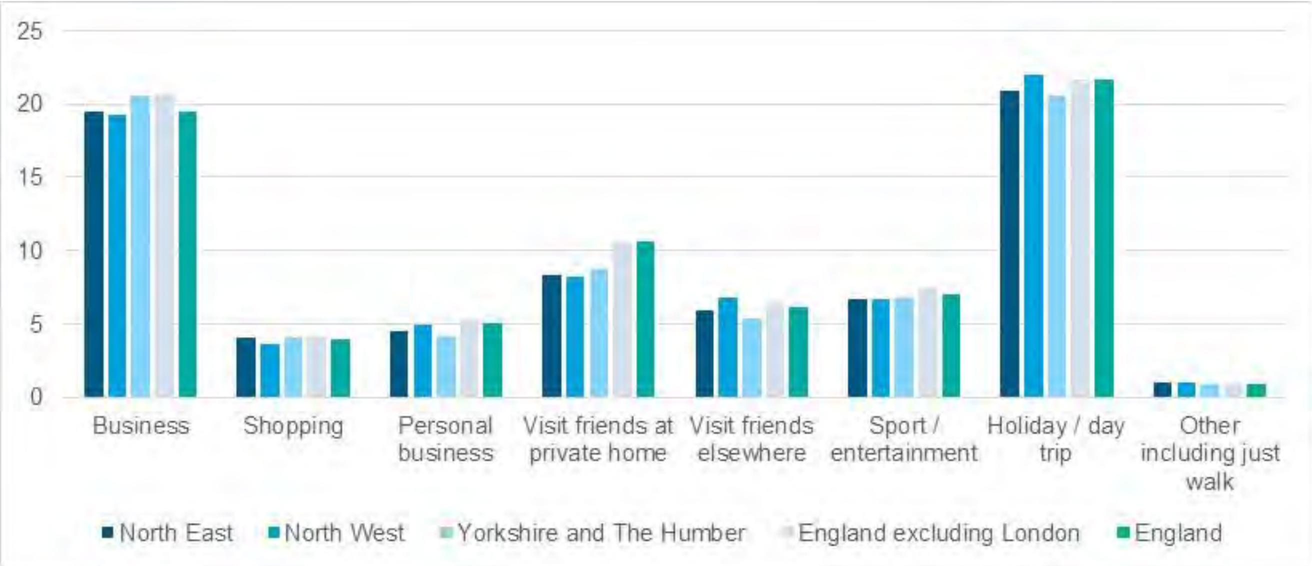


Figure 5-3 reveals that residents of Yorkshire and The Humber tend to travel further for business trips compared to residents of other parts of the North, and in comparison to England as a whole. In contrast, residents of Yorkshire and the Humber tend to travel shorter distances than residents of other Northern regions when travelling to visit friends outside their home. In general, residents of the North travel shorter distances to see friends at their homes in comparison to England as a whole. Residents of the North East and Yorkshire and The Humber also travel shorter distances than England as a whole for holidays or day trips, apart from residents of the North West who travel further.

Figure 5-4 - Average Trip Time (minutes)

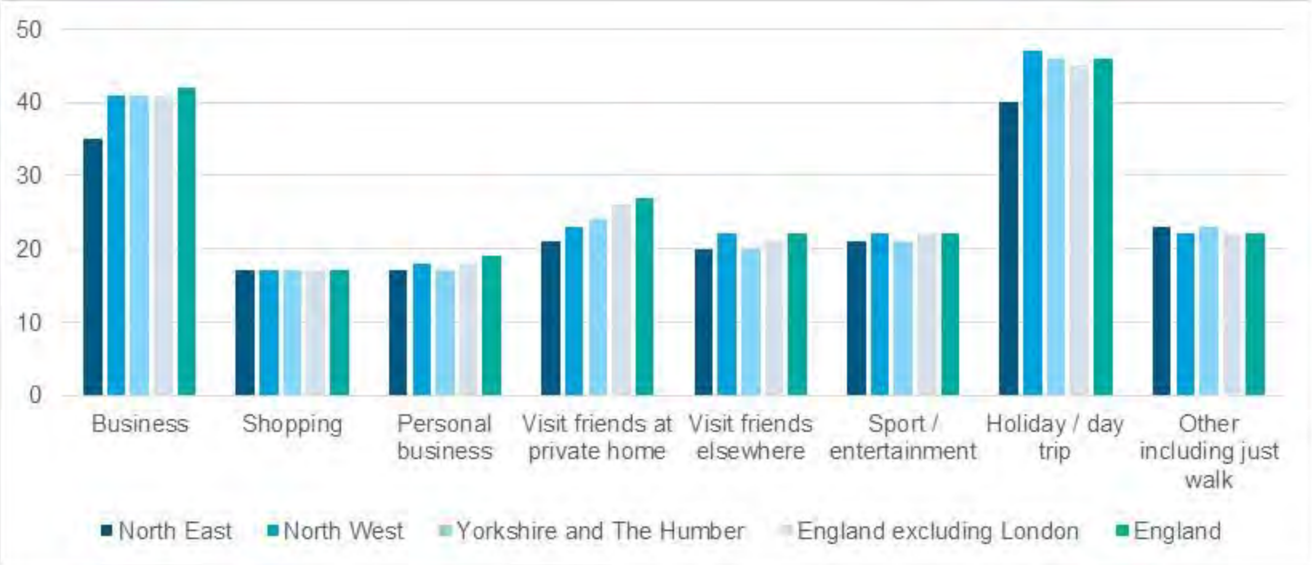


Figure 5-4 shows varied patterns. In particular, average travel times for business and holiday purposes are lower (over 5 minutes on average) for the North East than other parts of the North. Trips to visit friends at private homes tend to be shorter in the North than the rest of England, particularly in the North East. Differences in trip times for other visitor purposes are generally less pronounced.

Figure 5-5 - Percentage of households which do not own a car

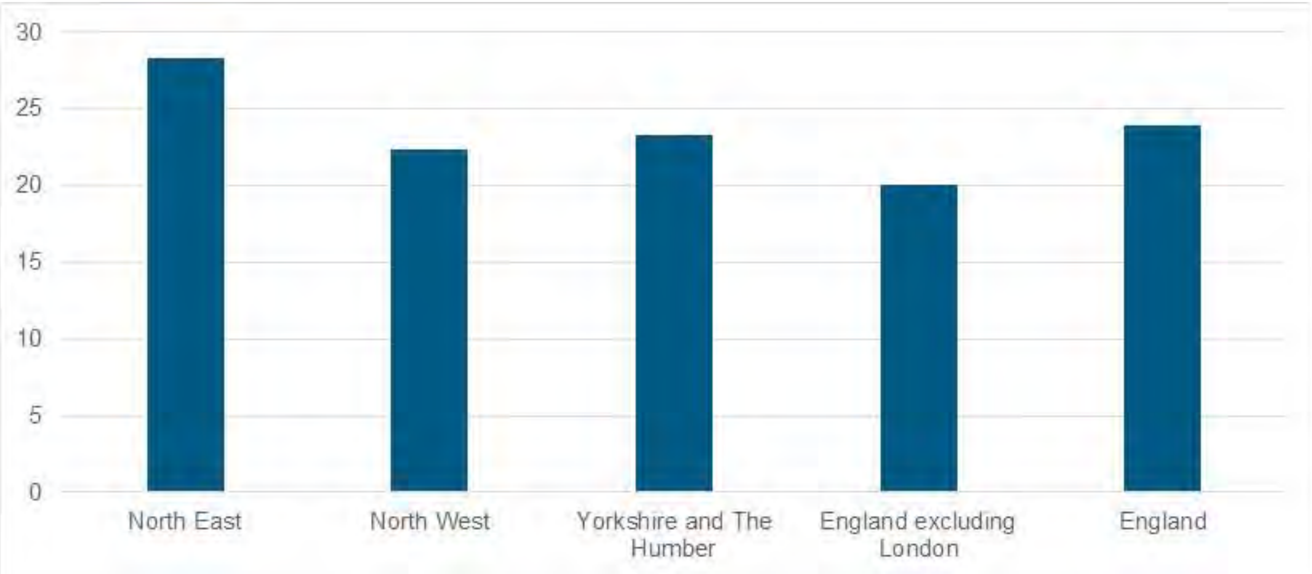


Figure 5-5 outlines the proportion of households which do not own a car. Across England, excluding London, 20% of households do not own a car. The three constituent regions of the North all feature an above average proportion of households which do not own cars. The highest proportion is found in the North East (28%), followed by Yorkshire and the Humber (23%), and the North West (22%). This is heavily skewed by income; nationally 65% of households in the lowest income decile do not own a car, while those with a disability are less likely to own a car. Government data also suggests a higher prevalence of income and health deprivation in all regions of the North in comparison to other parts of England[132], suggesting the presence of intersectional disadvantages related to health, income and transport within the North.

[132] https://commonslibrary.parliament.uk/health-inequalities-income-deprivation-and-north-south-divides/

5.2.2. Public Transport Use in the North

To complement the insights provided by the high level NTS data, Transport Focus data on rail and tram use has also been analysed. The following section presents an overview of the key trends.

5.2.2.1. Rail

Table 5-1 shows the proportion of rail journeys undertaken for leisure, business and commuting purposes across the Train Operating Companies (TOCs) which operate services within the North of England, or which serve major routes to and from the North. To aid comparisons with the broader UK picture, these figures have been aggregated to Regional operators (Merseyrail, Northern and TransPennine Express, and their other UK wide equivalents), Long Distance operators (Avanti, Cross Country, Grand Central, Hull Trains and LNER, and their other UK wide equivalents), and London and South East operators (TOCs which provide regional and urban routes radiating from London and serving the South East, such as Southern and Chiltern Railways). Additionally, full data for all 26 UK TOCs in both percentage and absolute terms is provided in Appendix C.

Table 5-1 - Rail Journeys by TOC and Purpose

	Commute	Business	Leisure
Avanti West Coast	9%	22%	69%
Cross Country	15%	28%	57%
Grand Central	5%	28%	67%
Hull Trains	10%	45%	45%
London North Eastern Railway	9%	31%	60%
Merseyrail	43%	1%	56%
Northern Rail	38%	9%	53%
TransPennine Express	26%	13%	61%
Aggregates			
Regional operators – North	36%	7%	57%
Regional operators – National	38%	9%	52%
Long Distance operators – North	10%	31%	60%
Long Distance operators – National	16%	24%	60%
London and South East operators	50%	13%	37%
All UK TOCs	45%	14%	41%

Source: National Rail Passenger Survey, Spring 2019

The data shows some clear trends which indicate different patterns of rail service usage in the North compared to other parts of the UK. This is exemplified across the North's regional and long distance TOCs, which both have lower levels of commuter journeys (36% and 10% respectively) in comparison to similar operators at a national level (38% and 16% respectively). The North's regional TOCs also record a lower level of business journeys at 7% compared to the national figure of 9%. However, the North's long distance TOCs record a greater proportion of business journeys (31%) compared to the national average of 24% respectively. The North's regional operators (Northern and TransPennine Express) also record a 5% higher share of leisure journeys in comparison to the national average for regional operators.

In comparison to London and South East operators, the North's TOCs serve a markedly different market. 50% of journeys undertaken on London and South East operators are for commuting purposes, with 41% being undertaken for leisure purposes. The equivalent figures for the North of England are 36% and 57%, again showing a trend for fewer commuting trips but more leisure trips made by train in the North. These statistics suggest the rail network has a much greater role in supporting the visitor economy in the North in comparison to other parts of the UK due to the higher proportion of leisure journeys which are undertaken by train in the North.

5.2.2.2. Tram

A number of towns and cities in the North feature tram networks which serve urban centres and the surrounding environs. Table 5-2 shows the proportion of tram journeys undertaken for commute and other purposes. The North's two urban tram networks, Manchester's Metrolink, and Sheffield's Supertram, both have usage patterns in line with the national average where just under half of trips are for commuting, and just over half are for other purposes, including leisure, business, and personal business. In contrast to this, Blackpool's Tramway has a particularly high non-commute share, likely due to it being a key tourist destination.

Table 5-2 - Tram Journeys by Network and Purpose

	Commute	Other
Blackpool Tramway	14%	86%
Manchester Metrolink	46%	54%
Sheffield Supertram	45%	55%
Tyne and Wear Metro	42%	58%
National Average	**44%**	**56%**

Source: Tram Passenger Survey, 2018, and North East Combined Authority Metro and Light Rail Strategy

5.3. Domestic Visitor Economy Travel Patterns and Demand

5.3.1. Introduction

The following section provides a more detailed picture of domestic visitor economy journeys undertaken to, from and within the North of England, primarily identified from analysis of the Special Licence National Travel Survey dataset. In order to ensure a sufficient sample size for this more granular analysis, 2015-2019 survey data was used.

The NTS provides both a purpose / location from which each journey originates, and a purpose at the destination which the respondent is travelling to. The following purposes from the NTS were identified as aligning most closely to this project's definition of the visitor economy:

- Day trip / just walk
- Eat / drink with friends
- Entertain / public activity
- Holiday: base
- In course of work
- Non-food shopping
- Other social
- Personal business eat / drink, medical and other
- Sport: participate
- Visit friends

Journeys undertaken for the above purposes were analysed to identify key long-distance journeys (defined as greater than 50 miles) to/from and within the North. The analysis also examines short distance journeys (defined as less than 50 miles) that either originated or end at a holiday base within the North. This analysis is reported at Unitary Authority / Combined Authority / County level, as this is the most granular level for which NTS origin destination data was available for this study. Consequently, Derbyshire and Staffordshire are included within the analysis in order to capture journeys to and from the Peak District.

5.3.2. Long Distance Visitor Journeys to/from the North

The following analysis examines long distance journeys recorded in the 2015-19 NTS. These journeys are made by residents of other regions of Great Britain, to or from the North for one of the purposes outlined in section 5.3.1.

Figure 5-6 - Top 10 Long Distance Flows to/from the North

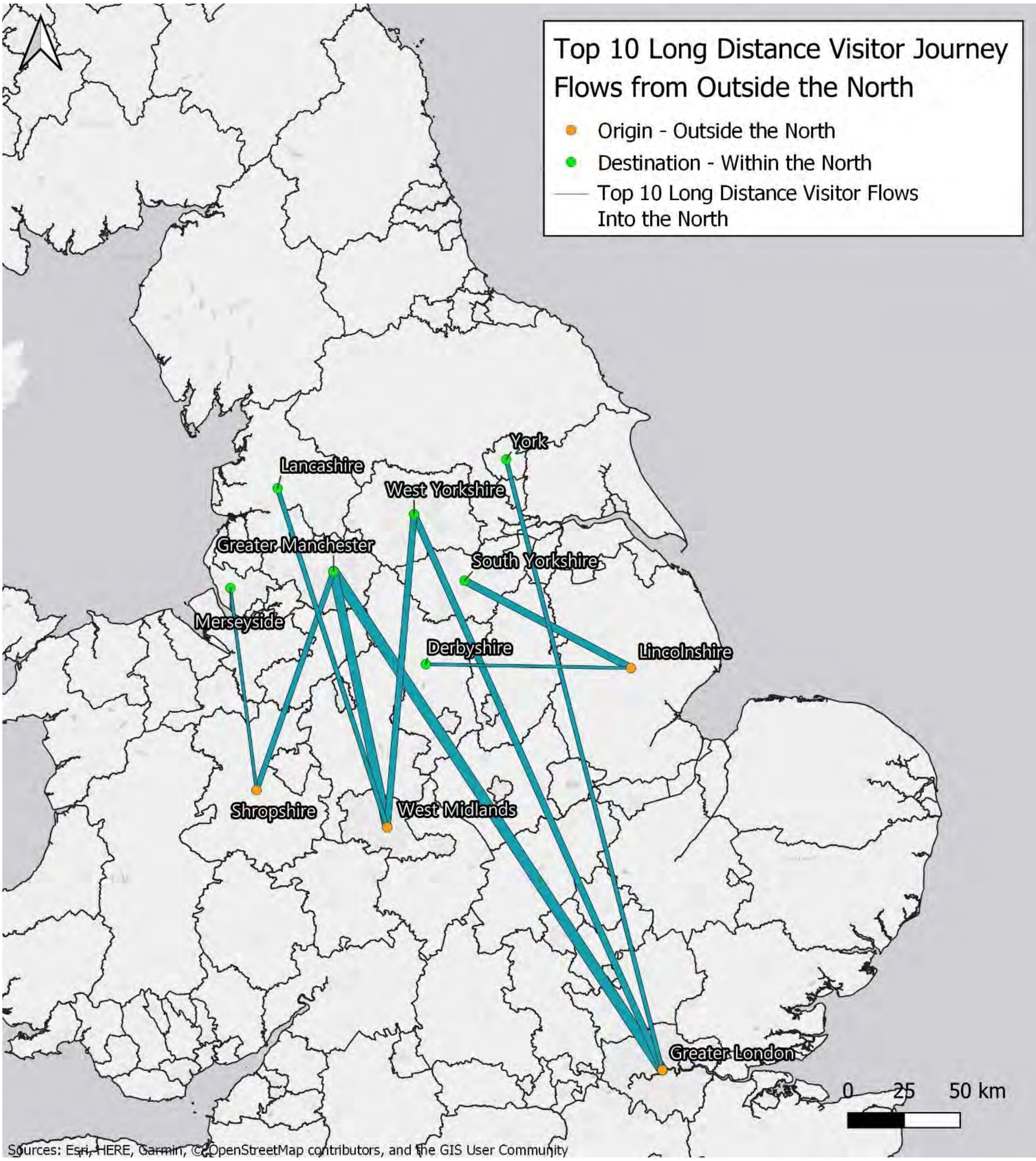


Figure 5-6 displays the top 10 two-way flows for journeys from outside the North to areas within the North undertaken for visitor purposes. The flows are mainly between large urban areas. For example, the two largest flows are between Greater Manchester and Greater London / the West Midlands. A large proportion of these trips are to visit friends, which explains why the largest flows are between heavily populated areas. Similarly, the majority of trips between West Yorkshire and Greater London / the West Midlands are to visit friends. This suggests that visiting friends is a large driver of leisure and visitor trips into the North from other areas of the UK. Trips to London from large Northern urban areas have a high rail modal share. For example, over one third of trips between Greater Manchester and Greater London are undertaken by rail, while between West Yorkshire and Greater London, this rises to over 50%. For trips to between Greater Manchester / West Yorkshire and the West Midlands, rail has a modal share closer to 10%.

In addition to flows between large urban areas, there are several large flows between rural areas outside the North to and from urbanised areas within the North. While visiting friends still provides the largest purpose for undertaking trips from rural to urbanised areas, non-food shopping is also a reason for a significant number of these trips. For example, the third largest flow overall is between Lincolnshire and South Yorkshire; almost half of these trips are undertaken to access non-food shopping facilities in South Yorkshire. This is likely due to the presence and proximity of the Meadowhall shopping centre, alongside a lack of significant urban areas in Lincolnshire, meaning that there are fewer choices for shopping. Around 10% of these trips are undertaken by rail with the rest being undertaken by car.

Finally, the importance of York as a key visitor destination within the North is highlighted within the NTS data. Although it has a lower population than many other cities within the North, a large enough number of visitor journeys are undertaken to and from the city to bring it within the top 10 largest flows. The large number of visitor journeys to and from York are accommodated by limited transport infrastructure; York has only one main railway station, and is linked into the wider Strategic Road Network by one dual carriageway A-road. In comparison, many of the North's other cities have much greater levels of infrastructure (motorway links and multiple railway stations, for example), consequently spreading demand across a larger number of gateways to these cities.

Figure 5-7 - Purpose of Long-Distance Trips to the North

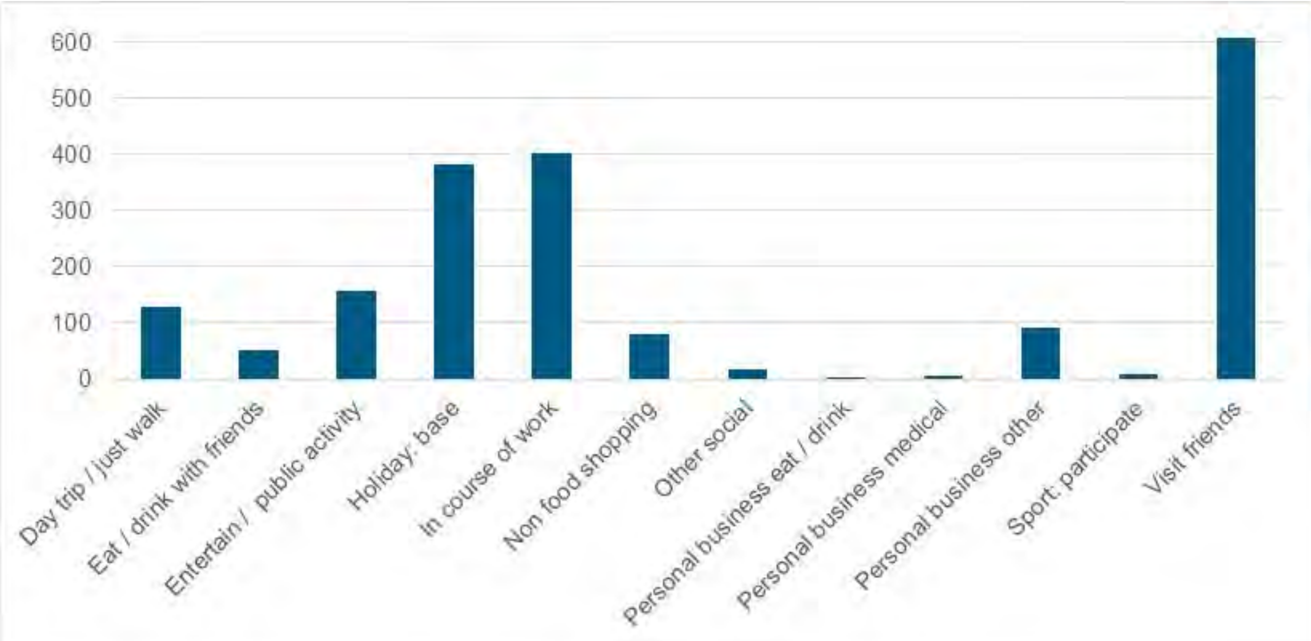


Figure 5-7 shows the overall trip purpose of visitors based on two-way flows between other areas of England and the North. "Visiting friends" is the main reason recorded for visitor journeys to the North. Another popular trip purpose is "in course of work", showing that, at least pre-Covid, business trips constituted a large proportion of the visitor economy. Journeys to and from a holiday base also account for a significant proportion of visitor trips to the North, suggesting that the North has UK-wide appeal as a holiday destination. The spatial distribution of these trip purposes is outlined by Figure 5-8 below.

Figure 5-8 - Most reported Trip Purpose amongst visitors to the North from other parts of England

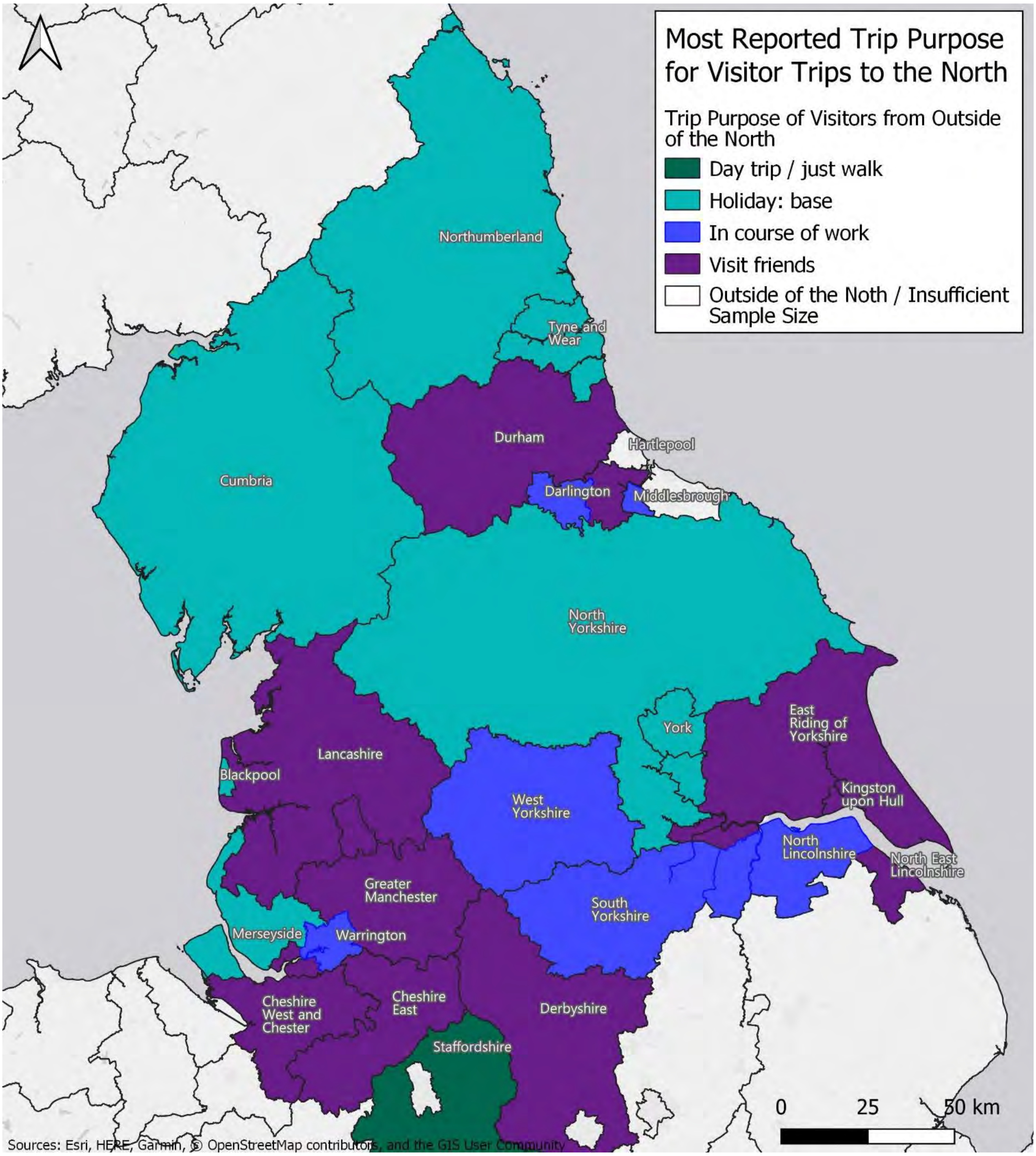


Figure 5-8 shows the most reported visitor trip purposes for each of the areas within the North. Due to low sample sizes, Hartlepool and Redcar and Cleveland have been excluded. As identified previously, visiting friends is the most reported purpose for a large number of areas. In particular, the North West features a large number of areas for which visiting friends is the most cited reason for travelling to the North. This could be a factor of the high population density of the North West area around Greater Manchester.

This is in contrast to the North's large rural counties, which are generally visited as part of a holiday. This includes Cumbria, Northumberland and North Yorkshire. These areas contain a number of the North's most significant visitor economy assets, including multiple National Parks and Areas of Outstanding Natural Beauty such as the

Lake District, Northumberland Coast and the North York Moors. These are significant attractions and draw many people to the region for holidays. In addition to these rural areas, some of the North's more urbanised areas, such as Tyne and Wear, York, and Merseyside, also receive a large proportion of visitors for holiday purposes. These areas are significant tourist attractions themselves, but they are also likely to be used as a base to visit the neighbouring rural areas such as Northumberland and North Yorkshire.

The most reported purpose for visiting Staffordshire was for day trips. As Staffordshire contains part of the Peak District National Park, it is likely that leisure trips to the National Park will be driving this demand for day trips. The final highly reported purpose for visiting the North from other areas of the UK is in course of work; which are likely to be business trips. These are particularly significant in North Lincolnshire and South Yorkshire within which large parts of the UK's manufacturing and steel industries are located, alongside a considerable logistics and ports presence. Additionally, West Yorkshire has a high number of in the course of work trips, which reflects the position of Leeds as an important centre for business, commerce, conferences and events. Other areas where trips in the course of work were the most reported purpose for a journey are Middlesbrough, Darlington and Warrington. This may reflect the economies of these areas, which are not based on tourism, but instead driven more by manufacturing, construction or other service businesses, which often locate to these areas due to their close proximity to major roads and railway lines.

Table 5-3 - Share of selected modes for long distance journeys to/from the North

Main Mode	Long Distance Journeys to/from the North	Long Distance Journeys within Great Britain
Car / van (driver or passenger)	78%	79%
Surface Rail	17%	16%
Non-local bus	1%	3%

Source: National Travel Survey, 2015-19

Table 5-3 shows the mode share of long distance visitor trips based on two-way flows between other areas of the UK and the North, and compares this to the overall long distance modal split for long distance journeys undertaken by residents of England. The data reveals that the mode split of long distance travel to/from the North is broadly similar to that observed from residents of all English regions. Specifically, car and bus usage is slightly lower, and rail usage slightly higher, which is likely due to the presence of a large number of urban areas in the North which are well connected by mainline rail infrastructure to other large urban areas such as London and the West Midlands.

5.3.3. Long Distance Visitor Journeys within the North

The following analysis examines long distance journeys recorded in the 2015-19 NTS. These journeys are between areas of the North, with either an origin or destination purpose categorised as a visitor trip as identified in section 5.3.1.

Figure 5-9 - Top 15 Long Distance Flows within the North

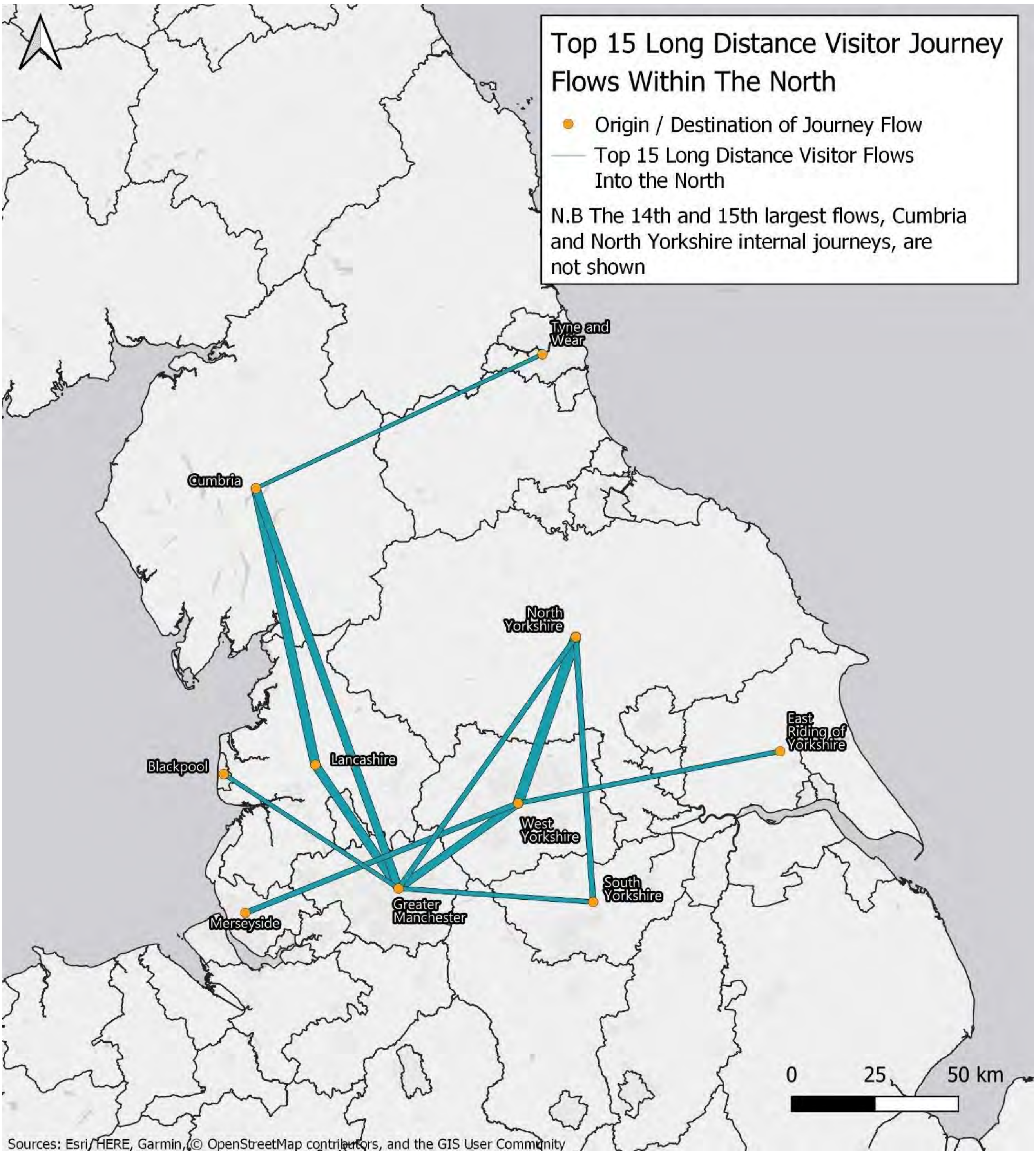


Figure 5-9 displays the top 15 two-way long-distance visitor economy flows within the North. Generally, the flows are between heavily urbanised areas of the North and rural areas. There are also a large number of journeys between the North's large urban areas, such as those between Greater Manchester, South Yorkshire, West Yorkshire and Merseyside. The third type of dominant flow is from the North's urban areas to the coast. Examples of this are flows between Manchester and Blackpool, and West Yorkshire to the East Riding of Yorkshire.

The largest flow occurs between West Yorkshire and North Yorkshire. A large number of these journeys tend to be people travelling from West Yorkshire to North Yorkshire for day trip or a longer holiday. However, there is a smaller flow in the opposite direction of journeys from North Yorkshire to West Yorkshire for non-food shopping, entertainment and business trips.

An example of a city region to city region journey is the fifth largest flow, which is from West Yorkshire to Greater Manchester. The purpose of these trips is varied, and includes business trips, entertainment, visiting / eating with friends and holiday trips. Over 20% of these trips are undertaken by rail suggesting that public transport modal share is relatively good on this corridor.

Similar patterns are observed between Manchester and Cumbria, where around half of all trips are undertaken by people travelling for a day trip or longer holiday. Holiday trips from Cumbria to Manchester also occur, alongside trips to visit friends. Car is by far the most predominant mode, however rail does account for over 15% of trips on this flow.

Between West Yorkshire and East Riding of Yorkshire there is a mix of people travelling to visit friends, shop, and stay multiple nights. In the other direction, people are generally travelling to the East Riding of Yorkshire from West Yorkshire for a day trip or a longer holiday stay. These trips are mainly undertaken by car, with a small number of rail journeys. Journeys between Greater Manchester and Blackpool are predominantly people travelling from Greater Manchester to Blackpool for a day visit or holiday trip and are mainly undertaken by car.

The smaller but still significant flows include intra-county trips in North Yorkshire and Cumbria, as well as trips from the Tyne and Wear area to Cumbria. For the Cumbria to Tyne and Wear flow, over a third of trips are for Holiday purpose. Visiting friends is also a frequently reported purpose. The number of day trips on this flow is low though, suggesting the current transport infrastructure does not support day visits between these counties.

Figure 5-10 - Purpose of Long Distance Trips within the North

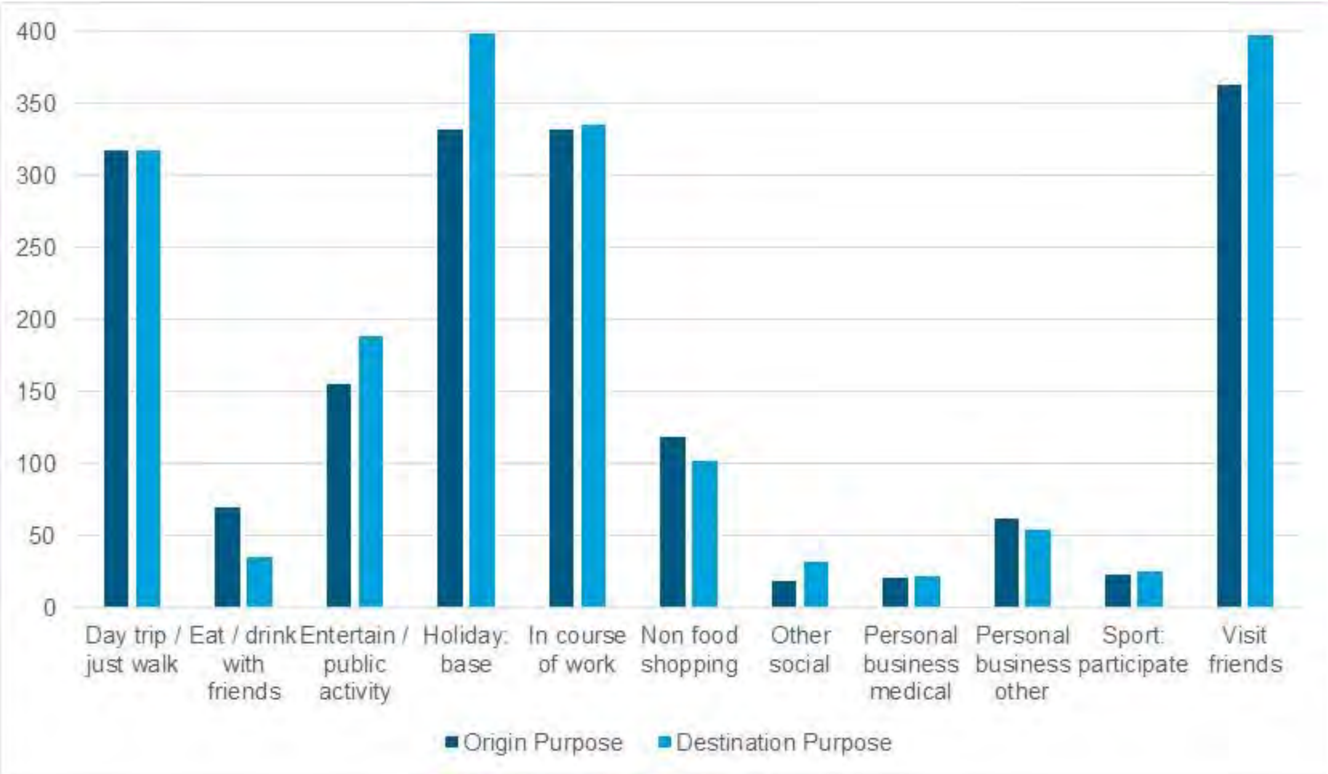


Figure 5-10 outlines the overall trip purpose of visitors travelling within the North. As both the origin and destination are within the North, and both the origin and destination purpose are recorded by NTS, a visitor trip has been classed as one in which either the origin or destination purpose aligns with the study definition for the visitor economy. Consequently, both origins and destination trip purposes are shown in the figure.

The trip purpose distribution for journeys undertaken within the North is broadly in line with the equivalent figures for journeys to and from the North. For example, visiting friends is the most frequently identified reason for travelling within the North, followed by journeys to a holiday base, and journeys in the course of work. Unsurprisingly however, day trips account for a far larger proportion of journeys within the North than journeys to the North from other areas of the UK. This likely to be due to the small distances between urban areas in the North and day trips generally being made to local areas e.g. a nearby National Park or city.

Figure 5-11 - Most reported Trip Purpose amongst visitors travelling within the North

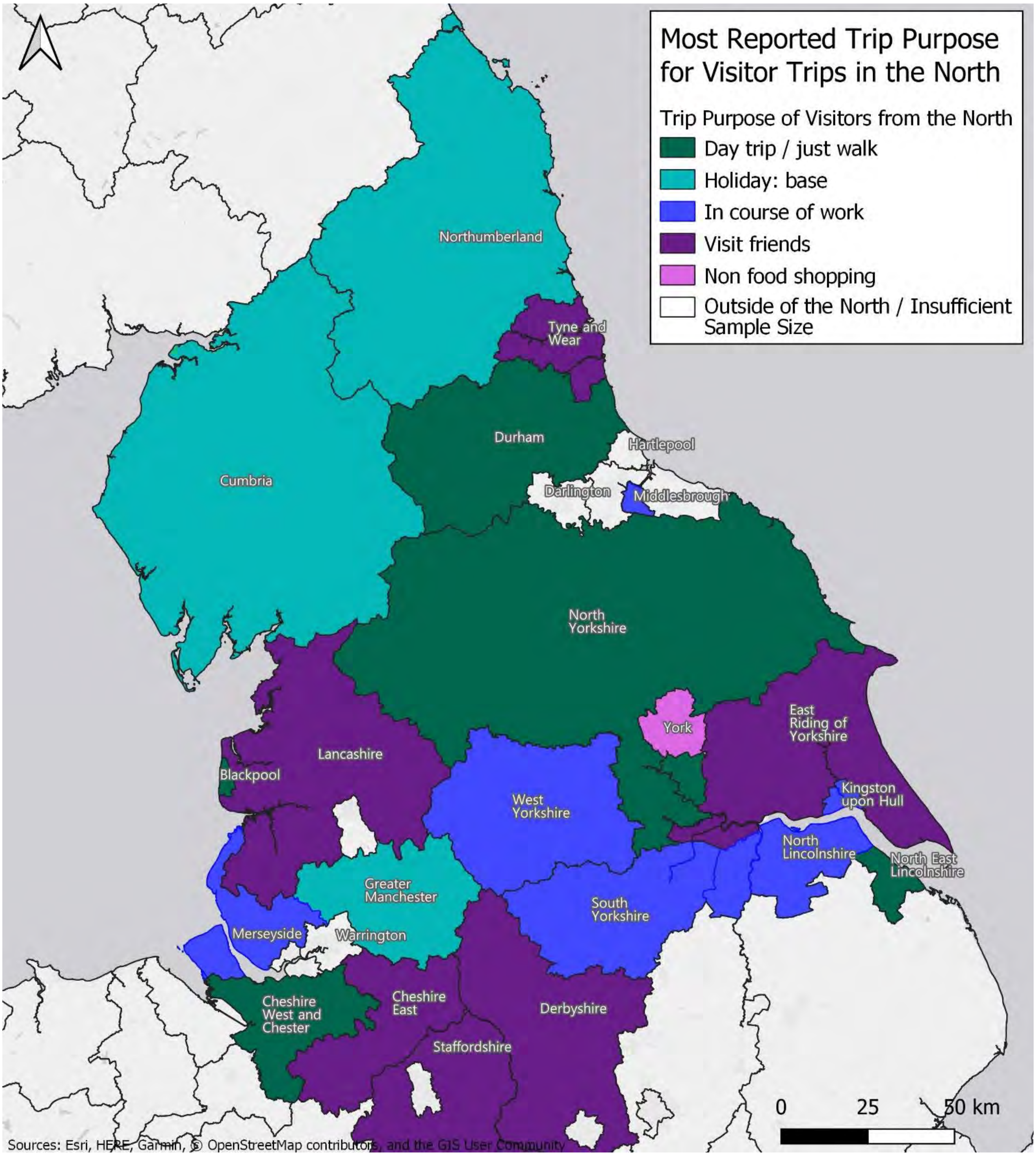


Figure 5-11 shows most reported visitor trip purpose for intra North journeys. Due to low sample sizes (most reported purpose response of less than 10), areas such as Hartlepool, Darlington and Warrington have been excluded. Visiting friends is the most reported trip purpose in several areas, which are largely within the North West. Journeys in the course of work account for the largest reported trip purpose in West Yorkshire, Merseyside, South Yorkshire, North Lincolnshire, Hull and Middlesbrough. Generally, these areas are urbanised and have strong business attractions.

Cheshire West and Cheshire has a large proportion of day trips, most likely due to the historical nature of Cheshire and the nearby Chester Zoo. For North Yorkshire and Durham, the most reported trip purpose is day trips. Both North Yorkshire and Durham contain a number of significant visitor attractors, and are within close proximity of large urban areas.

Finally, Northumberland, Cumbria and Greater Manchester's most reported trip purpose is travelling to a holiday base. This is unsurprising for Cumbria and Northumberland due to the attractiveness of the Lake District, Northumberland Coast and Kielder Forest to holidaymakers. Greater Manchester is also an attractive holiday destination, due to its cultural offer, museums, sports and concert venues. However, trips in course of work and visiting friends are similarly significant reasons for travelling to Greater Manchester, identifying the variety of attractors its visitor economy offers.

Table 5-4 - Share of selected modes for long distance journeys within the North

Main Mode	Long Distance Journeys within the North	Long Distance Journeys within Great Britain
Car / van (driver or passenger)	85%	79%
Surface Rail	8%	16%
Non-local bus	2%	3%

Source: National Travel Survey, 2015-19

Table 5-4 provides an overview of the mode share for long-distance trips within the North. The data reveals that a greater proportion of long-distance journeys within the North are undertaken by car in comparison with the national average. Rail attracts a smaller share of long-distance journeys within the North in comparison to the national average. This is in contrast to the mode split for long distance journeys to and from the North, where the share of rail and road were in line with the national average. This suggests rail is a less attractive mode for journeys within the North in comparison to journeys to and from the North.

5.3.4. Local Journeys while on Holiday within the North

The following analysis examines journeys of under 50 miles recorded in the 2015-19 NTS, with an origin or destination purpose of holiday base. This section therefore aims to understand how people travel when on holiday in the North. NTS Analytical Outputs provided by TfN have been adjusted using weighting to take into account that short walks are only recorded on the first day of the survey and that the reporting of trips tends to reduce as the survey week progresses.

Figure 5-12 – Trip Distance to/from a Holiday Base in the North of England

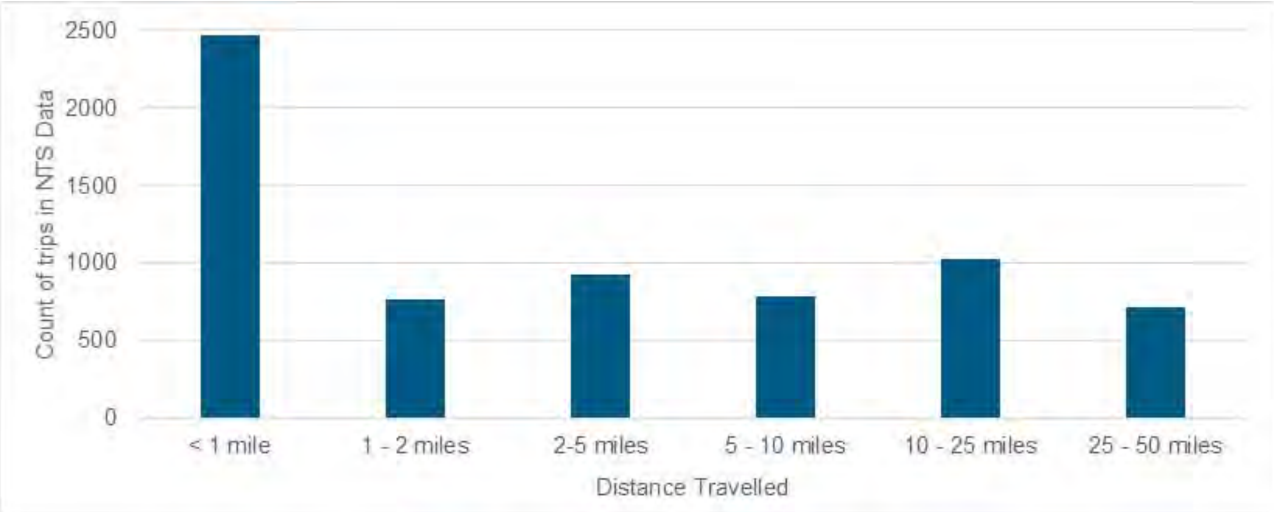


Figure 5-13 - Trips Per Person, Per Year – by Distance Travelled

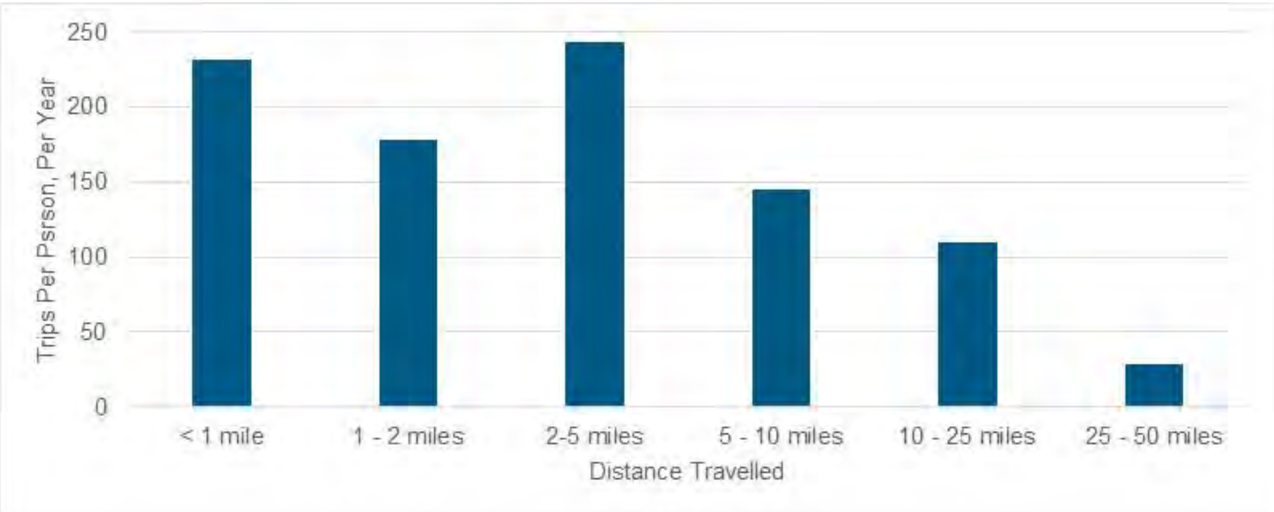


Figure 5-12 displays a count of trips to and from a holiday base taken from analysis of NTS data, while Figure 5-13 outlines the number of trips made per person per year in England, segmented by distance travelled. The purpose of including Figure 5-13 is to provide a comparison for trip length distribution.

The highest frequency of trips to/from holiday base are trips of less than a mile in length. Of these trips, 50% are made by those leaving their holiday base for a walk, or to eat and drink with friends. Shopping, both for food and non-food items, accounts for another 20% of trips of less than 1 mile to/from a holiday base.

Comparing the distribution between holiday base trips and England trips per person, trips of 1-2 miles and 2-5 miles are far lower to / from holiday bases compared to the average trips per person. Additionally, unlike overall trips in England, longer distance trips of 25 – 50 miles to / from a holiday base are not significantly lower than other trip categories. This suggests that while at a holiday base, more trips of less than 1 mile are generated. Therefore, when on holiday, people don’t want to travel long distances and generally like to stay within their immediate vicinity. The reason for the higher level of longer trips is a result of people travelling between homes and holiday base. This accounts for over 50% these trips, however nearly 25% of these longer trips are for day trips suggesting that people are willing to travel a large distance to visit attractions from their holiday base.

Table 5-5 - Comparison of Distance Travelled to/from a Northern Holiday Base and All Trips in England, by Selected Modes

	1 mile		1 - 2 miles		2-5 miles		5 - 10 miles		10 to under 25 miles		25 to under 50 miles	
Mode	**Holiday Base**	**England**	**Holiday Base**	**England**	**Holiday Base**	**England**	**Holiday Base**	**England**	**Holiday Base**	**England**	**Holiday Base**	**England**
Walk	96%	80%	65%	31%	23%	4%	2%	0%	1%	0%	0%	0%
Car / van (Driver or Passenger)	3%	18%	30%	59%	63%	79%	78%	81%	82%	82%	83%	80%
Bus	1%	1%	1%	5%	5%	10%	4%	8%	5%	4%	2%	1%
Taxi / minicab	0%	0%	2%	1%	4%	2%	7%	1%	5%	1%	7%	1%
Bicycle	0%	1%	0%	3%	2%	2%	1%	1%	2%	1%	0%	0%
Surface Rail	0%	0%	0%	0%	1%	1%	2%	3%	2%	7%	5%	14%

Table 5-5 shows the modes used by distance travelled for trips to / from holiday bases in the North, and the mode share across the whole of England. The mode share for England was calculated using NTS trips per person per year for 2019, which was then segmented by distance travelled.

The data reveals that short trips of less than 5 miles to / from a holiday base are far more likely to undertaken by walking, and less likely to be undertaken by car than trips in England overall. A potential reason for this is that holidays are more relaxed than everyday life, and therefore people are less concerned about journey times. Additionally, walking to explore an area is likely to form a significant number of holiday trips and therefore the increased proportion of walking trips while on holiday may reflect this.

Trips of 2 miles or under to / from a holiday base are less likely to be undertaken by bicycle than the England average. Trips between 2 and 10 miles are in line with the England average. Trips of greater than 10 miles in length are more likely to be undertaken by bike than the England average. The small sample size for cycling trips means it is hard to draw a definitive conclusion from the data, however evidence from the literature review identified the removal of barriers as being an important facilitator of increasing the number of cycling trips made by visitors.

The data also reveals that taxis generally have a greater mode share amongst trips to and from a holiday base in comparison to the England average. This likely reflects unfamiliarity with local public transport services, lack of accessibility to a car if travelling to the holiday destination by public transport, or trips generated by the Night-time economy.

Public transport is generally utilised less for holiday base trips than overall trips in England. This may reflect lower levels of familiarity with local public transport services. Also, many of the North's visitor economy assets are located within rural counties such as North Yorkshire, Cumbria and Northumberland. These areas have poorer public transport provision in comparison with urban areas, causing a further barrier to the use of sustainable modes.

Figure 5-14 - Proportion of trips to/from a Holiday Base undertaken by Walking

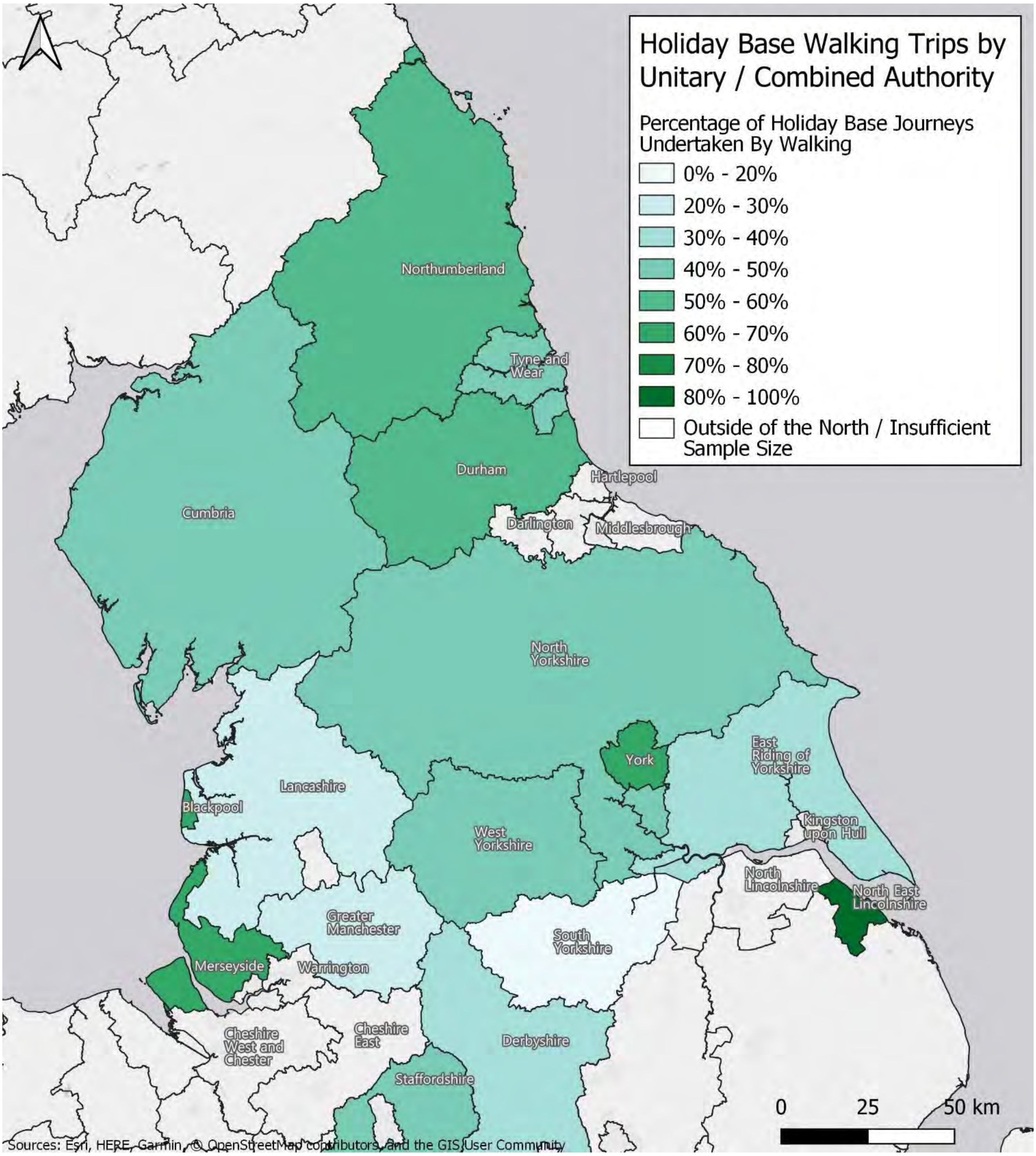


Figure 5-14 shows the percentage of trips undertaken by walking to / from a holiday base in the North. Generally, the North's rural counties, including Cumbria, North Yorkshire, Durham and Northumberland, record higher numbers of walking trips. Some urban areas also record higher levels of walking trips, particularly coastal ones such as Merseyside, Blackpool and North East Lincolnshire. On the other hand, Lancashire, Greater Manchester and South Yorkshire record the lowest levels of walking trips, suggesting visitors to these areas rely on other modes of transport, or are not as confident to explore the area on foot.

Figure 5-15 - Proportion of trips to/from a Holiday Base undertaken by Cycling

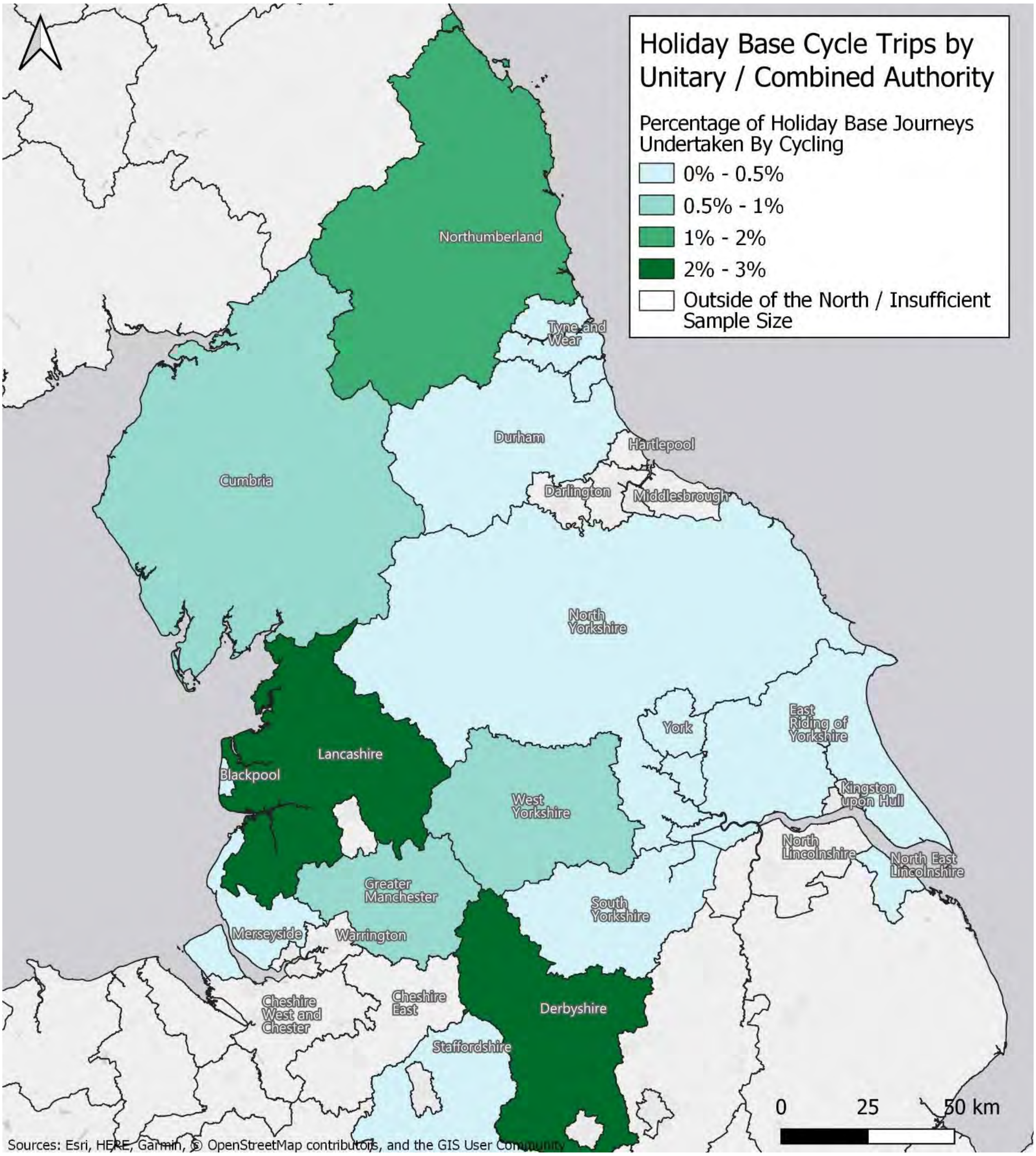


Figure 5-15 shows the percentage of trips undertaken by cycling to / from a holiday base in the North. Generally more rural areas such as Derbyshire, Cumbria and Northumberland have higher percentages of trips undertaken by cycling. Lancashire also has a high number of cycling trips from holiday bases. This potentially reflects the visitor offer, plus the quality and character of cycle facilities in these places, which are facilitating higher levels of active travel.

Figure 5-16 - Proportion of trips to/from a Holiday Base undertaken by Public Transport

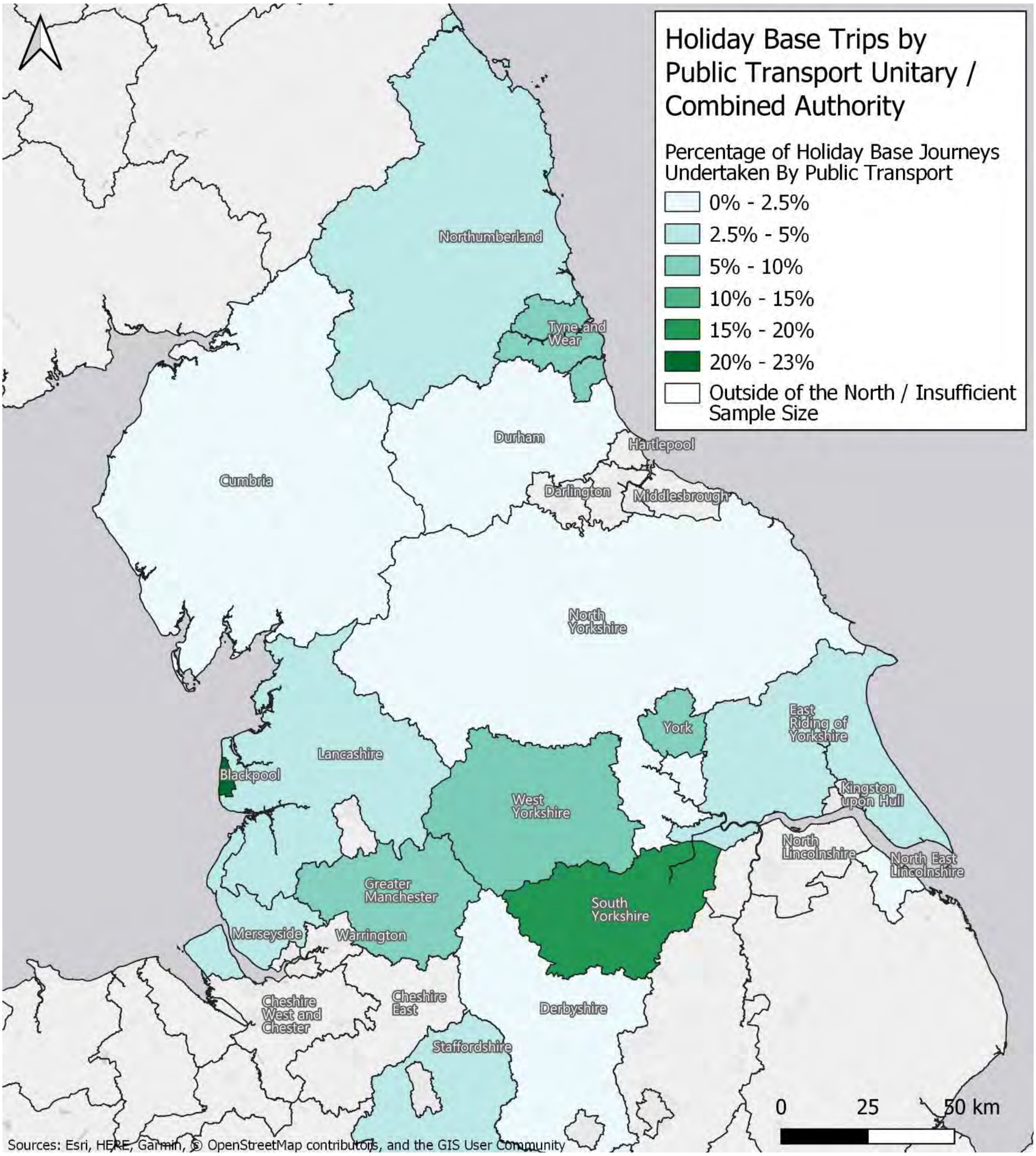


Figure 5-16 shows the percentage of trips undertaken by public transport to / from a holiday base in the North. In general, the North's large urban areas, such as Greater Manchester, Tyne and Wear, South Yorkshire, and West Yorkshire, have higher percentages of public transport use for trips to and from a holiday base. Certain smaller urban areas such as Blackpool and York also have high public transport usage. This likely reflects Blackpool's tram and extensive bus network and York's good levels of rail connectivity. Generally, the North has poor public transport usage for holiday base trips with most areas having public transport mode shares of 5% or less.

5.3.5. Rail journeys to and within the North

In addition to the findings of the NTS analysis, this section also draws on insights generated from analysis of a rail ticket sales dataset, provided by TransPennine Express. The dataset contains point to point flow data for the most popular journeys to the North of England undertaken between February 2019 and February 2020. This data was generated using sales of Off-Peak, Super Off-Peak, and Advance tickets as a proxy for leisure travel, since journey purpose is not recorded at the point of sale. Where possible, this analysis considered only return tickets to verify journey directionality. However, due to the withdrawal from sale of return tickets on the East Coast Mainline from January 2020, return ticket sales data was supplemented by analysis of Advance ticket sales on these flows. Because rail industry data sources do not contain precise information on journey purpose, this data has been included as an insert within this report to facilitate the development of a better understanding of some of the North's primary longer distance and inter-urban rail flows.

Figure 5-17 - Most Popular Rail Flows from London to the North

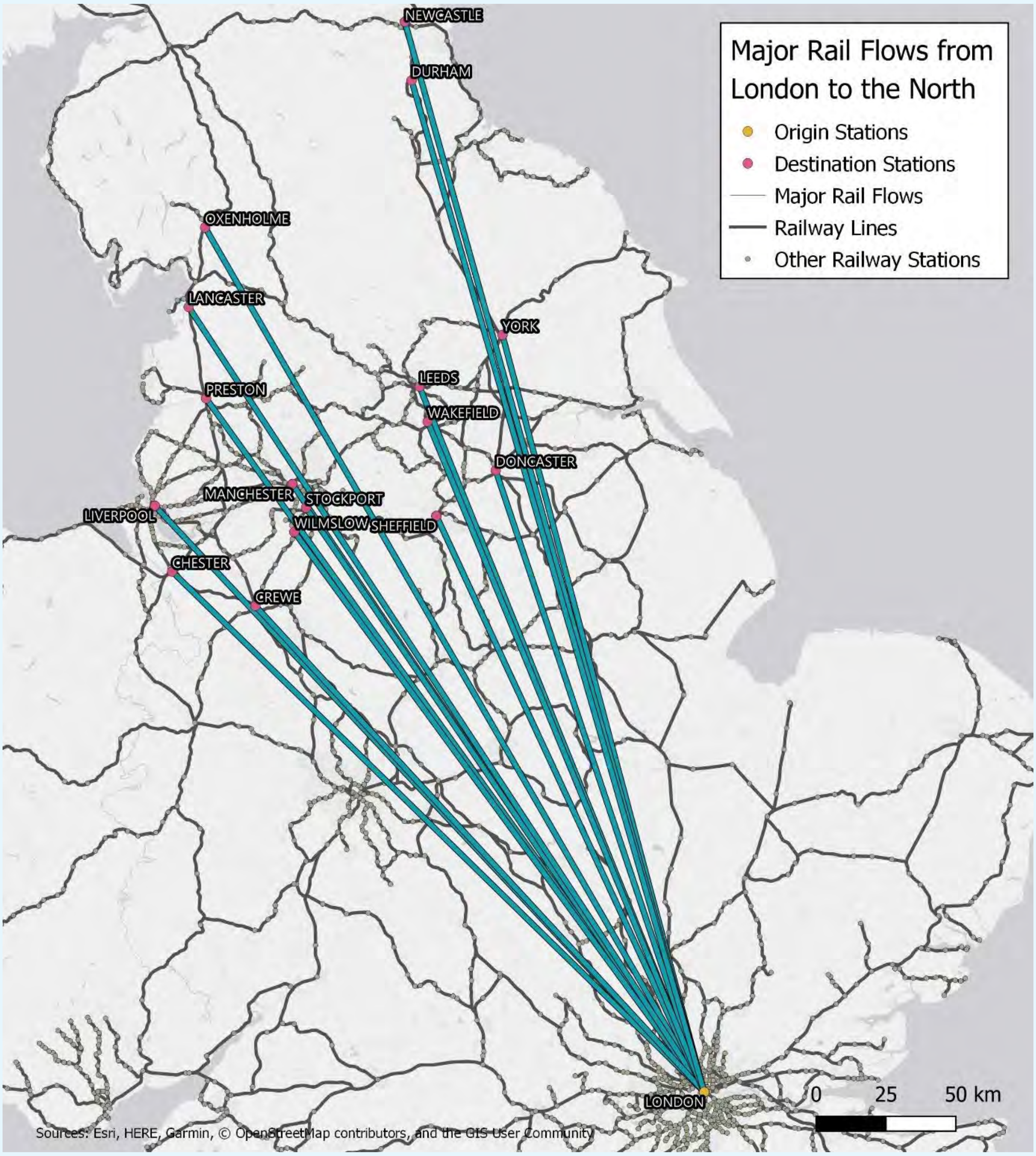
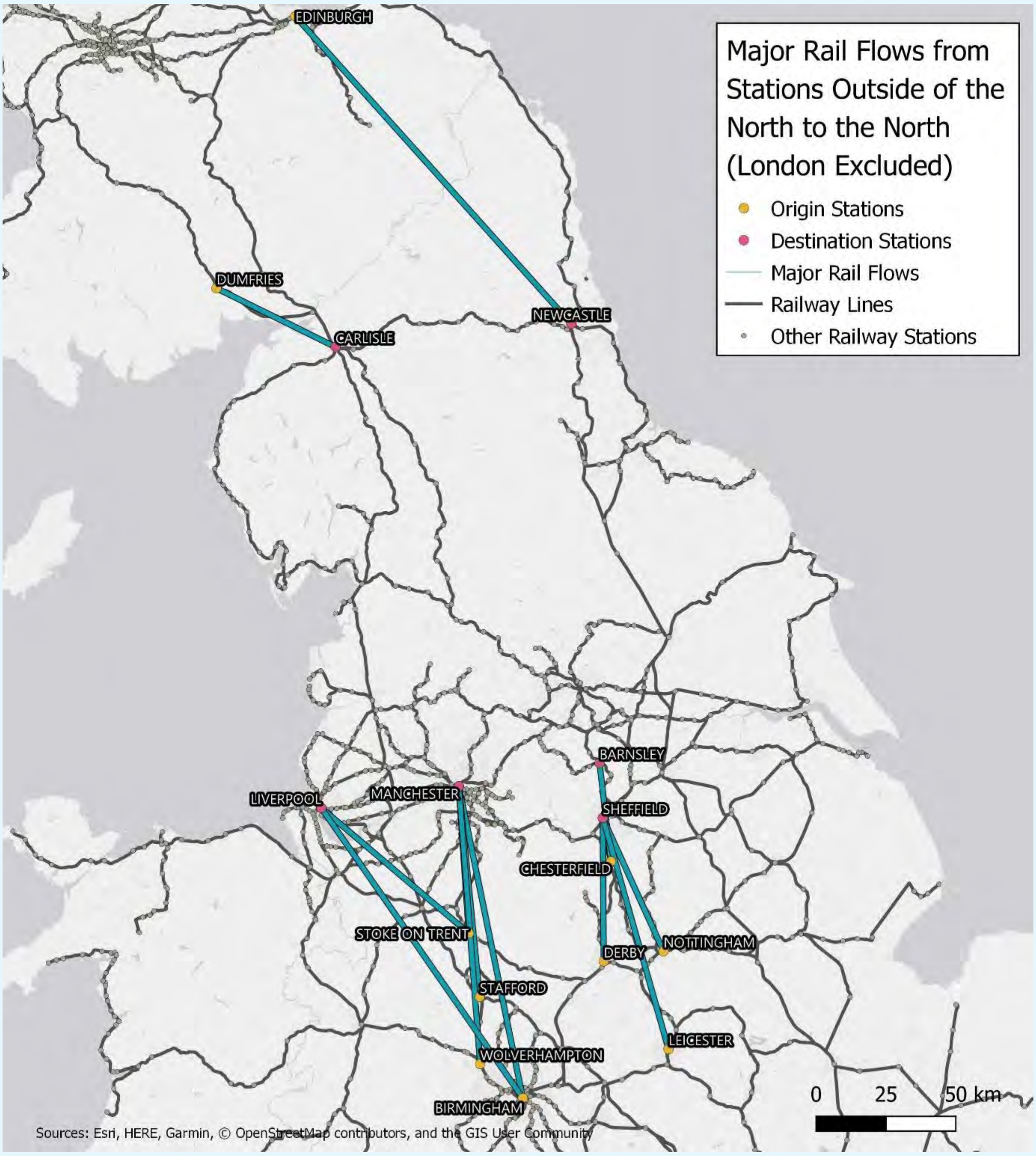


Figure 5-18 - Most Popular Rail Flows from other regions and nations to the North



The flows can be generally split into two broad categories. The first group is long distance flows between major cities outside of the North and major cities / tourist areas within the North. The second is more local flows between towns and cities that are located in close proximity to the North.

Figure 5-17 identifies a large number of popular rail flows between London and towns and cities in the North. Flows such as London to Manchester, Leeds and Liverpool attract the largest passenger numbers, broadly in line with visitor numbers. Large flows can also be seen between London and cities typically associated with tourism in the North such as Chester, York, and Durham. Finally, large flows from London to stations that act as hubs for onward travel can also be identified. This includes Crewe, Preston, Doncaster, Wakefield, Lancaster and Oxenholme (for the Lake District). These stations combine fast intercity rail links with a wide range of destinations in the North, with close proximity to key attractions and destinations.

As shown on Figure 5-18, flows from towns and cities outside of the North are mainly found between the West Midlands and Manchester and Liverpool, and the East Midlands and Sheffield. There are no significant passenger flows to Leeds which may reflect the poor rail infrastructure from Leeds to cities in the Midlands. A similar flow can be identified between Newcastle to Edinburgh, which likely reflects the relatively strong infrastructure and service provision between these cities. Additionally, there are flows between towns which straddle the North's border, such as Chesterfield to Barnsley and Dumfries to Carlisle, reflecting localised leisure and retail markets.

5.4. International Visitor Economy Travel Patterns and Demand

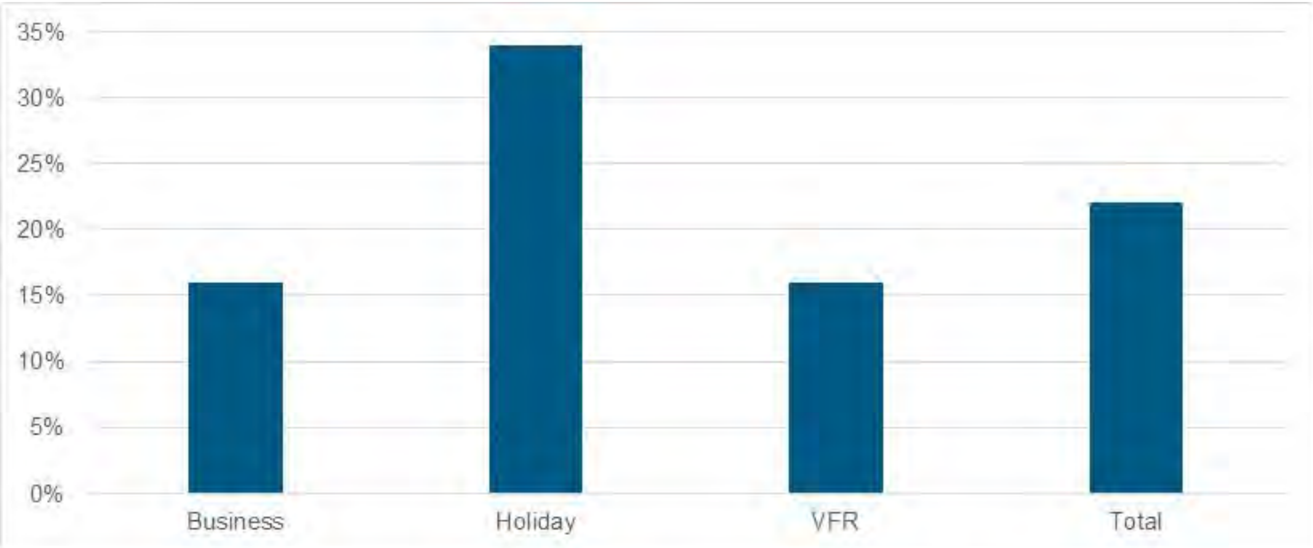
5.4.1. Introduction

The following section provides an overview of key transport trends among international visitors to the North of England. Key points of entry to the North are identified to understand how international visitors enter and leave the region. Information on journeys to the North's airports made by departing international passengers is then analysed to understand the modes used, and the origin points within the North. This analysis is segmented by journey purpose (leisure and business) to help understand how visitor patterns vary.

5.4.2. Entry Points to the North

The following section outlines the key entry points for international visitors to the North of England. Differentiation is made between direct and indirect visits. A direct visit is where the first place visited in the UK by an international visitor is part of the North, while indirect visits are where an international visitor visits another part of Great Britain before visiting the North.

Figure 5-19 - Proportion of Indirect Trips to the North



Source: RAND Europe Analysis of International Passenger Survey 2017 - 2019

78% of trips to the North are direct, with 22% of trips involving a stay in another destination before travelling onwards to the North. Visitors taking a holiday in Great Britain are most likely to make an indirect trip to the North (34% of trips), with those visiting friends and relatives, or on business, least likely to make an indirect trip (16%).

Table 5-6 – Port of arrival amongst international visitors making a direct trip to the North

UK Arrival airports or ports	Business	Holiday	VFR	Total
London airports - Heathrow, Gatwick, Stansted, City	8%	12%	8%	9%
Airports in North	75%	71%	81%	76%
Scottish airports	1%	7%	3%	4%
Other UK airports	2%	1%	2%	2%
Other ports (Sea, Eurostar, Channel Tunnel)	14%	8%	6%	9%
Total, excluding air transfers	100%	100%	100%	100%

Source: RAND Europe Analysis of International Passenger Survey 2017 - 2019

Table 5-6 identifies that the majority of visitors to the North arrive at one of the North's own airports. This ranges from 81% amongst those visiting friends and relatives, to 71% of those visiting Great Britain for a holiday. People taking a holiday are more likely to visit another part of Great Britain first (34% of international visitors to the North visit another part of Great Britain first), may be travelling to/from a country with limited direct services to the North's airports, or may be less sensitive to journey times than other categories of traveller.

London's airports are the second most popular international gateway to the North; however, it must be noted they account for only 9% of international trips to the North. This is followed by Scotland's airports, which receive 4% of the North's international visitors as a whole, but 7% of holiday visitors; this is potentially visitors to Cumbria or Northumberland, which are in close proximity to Scotland's airports, or visitors to the North planning to spend time in Scotland during their trip to Great Britain. Other ports, which include sea ferry, Eurostar and Channel Tunnel shuttle, are used by 9% of visitors to the North of England overall, but are particularly popular amongst business visitors, where they are used by 14% of visitors.

Journeys to the North from Northern Ireland were not able to be considered in detail as part of this study, as none of the datasets on visitor travel specifically include data on visitor trips from Northern Ireland, the Channel Islands or the Isle of Man to the North. Journeys from Northern Ireland to the North are not included within the National Travel Survey, while other sources, such as the International Passenger Survey, do not enable differentiation between visitors originating in Ulster or Eire, or identify whether the North of England represents the final destination or is acting as a gateway to Great Britain. While technically domestic visitors, visitors from Northern Ireland and the Isle of Man generally behave more in line with international visitors. In terms of number of visitors to the North, Northern Ireland is the most significant, with 2.1 million visits to Great Britain overall per annum, 298,000 of which are via the North's ports[133]. 537,000 visits by residents of the Isle of Man are recorded per year, 527,000 of which are made via the North's ports[133].

The North's ports and airports are also important assets to the UK's wider international connectivity and are used by residents of neighbouring regions and countries. Evidence supplied by the project Steering Group has identified the role of Liverpool Airport as a gateway for visitors to North Wales and the West Midlands, and Newcastle Airport's role as a gateway to southern Scotland. While not part of the North's visitor economy, journeys made between the North's airports and other parts of the UK contribute to a proportion of surface access demand, and therefore should be taken into consideration when planning transport services and infrastructure.

5.4.3. Journeys to and from the North's Airports

Civil Aviation Authority CAA Departing Passenger Survey data was provided for airports within the study area. This data included detailed trip purposes, alongside a broad journey purpose variable to differentiate between leisure and business. The data was split by foreign and UK residents, allowing international visitor journeys to be separated from those being made by UK residents. The results of two survey questions were analysed to develop insights relevant to this study:

- What mode of transport did you use to travel to XXX airport today?
- Where in the UK did you begin your journey to?

These questions provide details of the mode used to access the airport for foreign passengers and the area which these passengers have travelled from. This helps to identify areas that may be a hotspot for foreign visitors, although caution has to be taken as the journey origin to the airport may differ from the area the visitor spent most of their time or undertook the specific visitor function. For example, the person surveyed may have travelled

[133] DfT Sea Passenger Statistics 2019

to near the airport the day before, and therefore would report the journey from the place where they stayed near to the airport. The dataset contained information on the North's four busiest airports: Manchester Airport, Newcastle International Airport, Liverpool John Lennon Airport, and Leeds Bradford Airport.

5.4.3.1. Manchester Airport

Table 5-7 shows the mode used to access Manchester Airport by foreign residents for both leisure and business purposes as well as the mode share for all trips to Manchester Airport to provide a comparison.

Table 5-7 - Mode used when travelling to Manchester Airport

Mode	Percentage (Business Foreign)	Percentage (Leisure Foreign)	All Trips to Manchester Airport
Car	38.3%	45.4%	50.9%
Taxi	36.1%	21.8%	28.1%
Bus / Coach	2.9%	5.7%	2.7%
National Rail	22.2%	26.4%	17.1%
Light Rail	0.4%	0.7%	0.4%
Other	0.1%	-	0.1%
Total	100.0%	100.0%	100.0%

Table 5-7 identifies that that foreign visitors use a car significantly less than the modal share for all trips. This is particularly the case for foreign business visitors, where car travel accounts for less than 38% of passenger access compared to 51% for all trips. Leisure visitors tend to use a car more than business visitors, likely because they are in the UK for a longer period and therefore rent a car, or they are visiting friends or relatives in the UK and therefore can be dropped off at the airport. Foreign business visitors' main mode to access the airport is taxi. This is likely to reflect that business users can claim expenses for travel and therefore use the easiest and quickest mode. Taxis are perceived by international visitors to provide a more straightforward experience than public transport, as they provide a door to door service, and do not require an understanding of UK public transport ticketing rules and systems. Despite this, the modal share of public transport is higher amongst foreign visitors compared to all passenger trips to Manchester Airport; over 32% of foreign leisure travellers arrive at the airport by public transport, compared to just over 20% of all trips. Manchester Airport is served by frequent, direct rail services to most parts of the North, Metrolink services to Greater Manchester, and coach and local bus services to surrounding towns and cities, therefore making public transport an attractive surface access mode.

Figure 5-20 - Origin of foreign business visitors departing from Manchester Airport

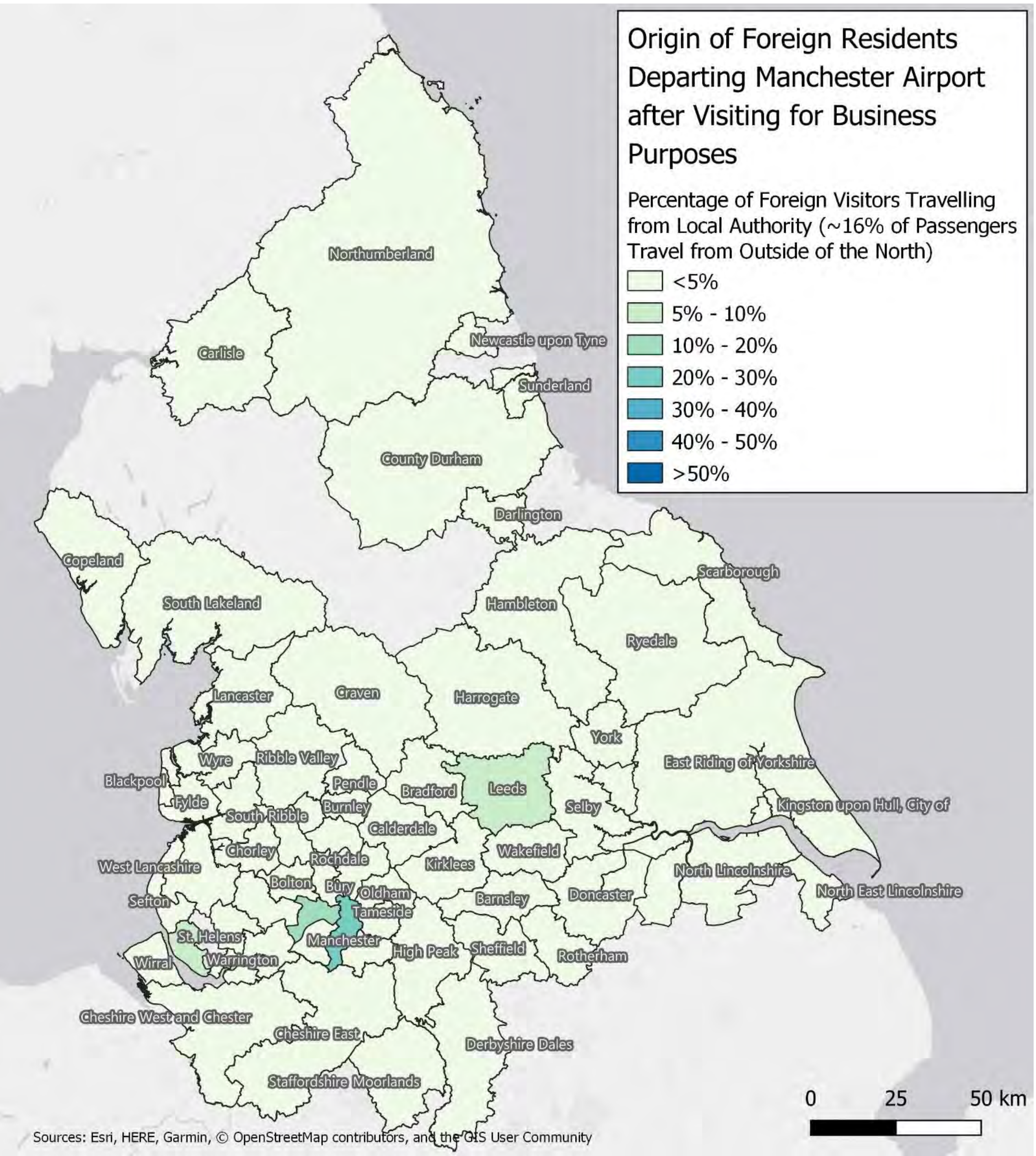


Figure 5-20 shows the areas foreign business visitors travelled from to access Manchester Airport. The map identifies the airport's wide catchment area, which makes it a hub for international business visitors accessing all parts of the North. Manchester Airport's wide catchment area is likely both a reflection of the volume of flights available to a wide range of destinations, and the airport's relatively good surface access in comparison to other airports. The local authorities with the highest number of business visitors travelling via Manchester Airport are Manchester, Salford, Liverpool, and Leeds, reflecting the status of these areas as important business centres. Alongside traffic generated by business visitors to the North, around 16% of foreign business travellers using Manchester Airport are visiting areas outside the North. Again, this highlights the attractiveness of flying via Manchester Airport, and the importance of links to and from the North to neighbouring regions.

Figure 5-21 - Origin of foreign leisure visitors departing from Manchester Airport

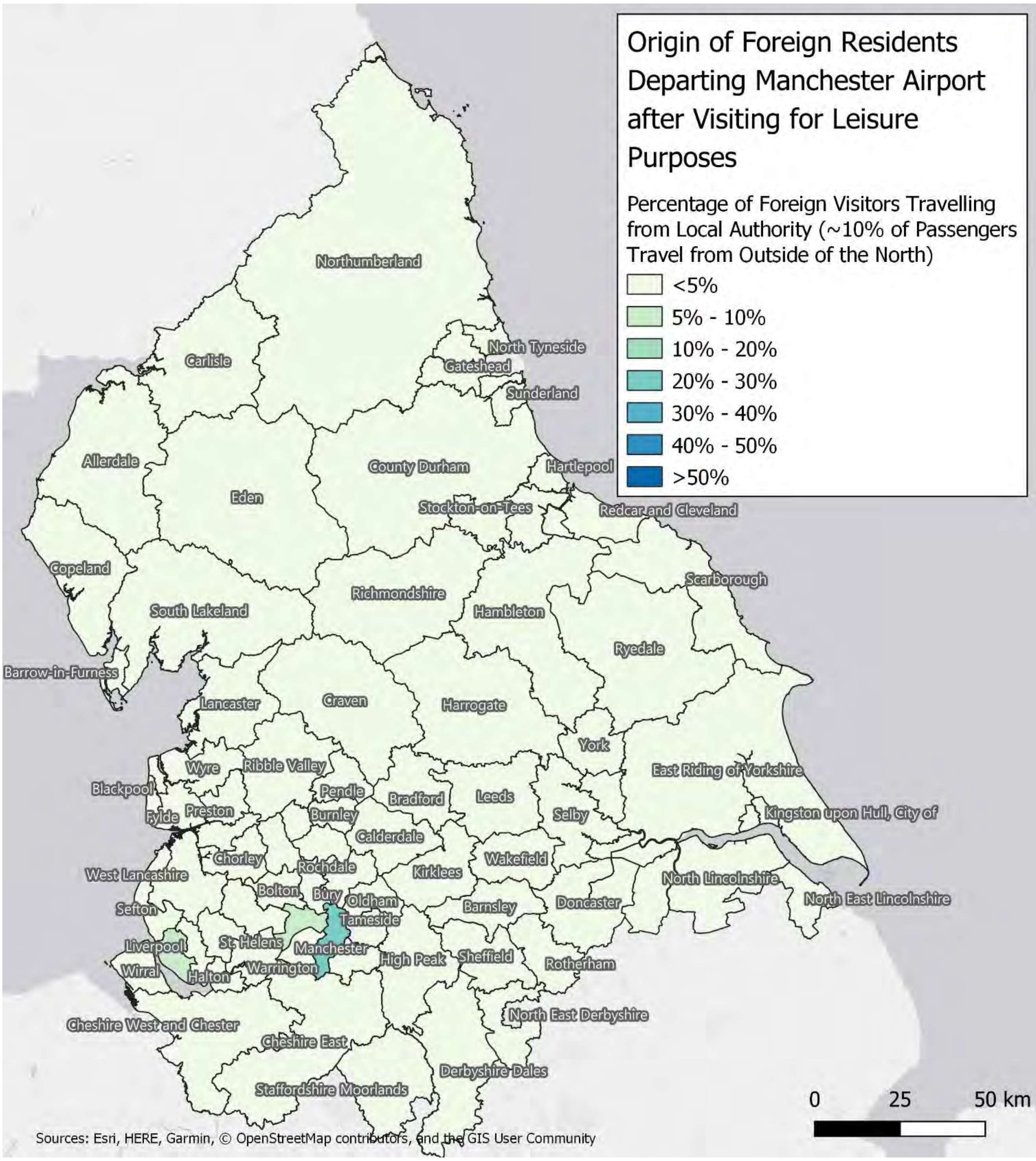


Figure 5-21 outlines the areas foreign leisure visitors travelled from to access Manchester Airport. The number of local authority origins is greater for leisure visitors than for business visitors. Again, the wide catchment reflects Manchester Airport's importance for the North. Liverpool, Salford and Manchester are the only local authorities from which more than 5% of Manchester Airport's foreign leisure visitors travel from. This is likely to be as a result of the tourist attractions in these areas, and their relatively high populations. It may also reflect passengers breaking their journey in Manchester / Salford before travelling to the airport.

5.4.3.2. Newcastle International Airport

Table 5-8 shows the mode used to access Newcastle Airport by foreign residents for both leisure and business purposes as well the mode share for all trips to Newcastle Airport to provide a comparison.

Table 5-8 - Mode used when travelling to Newcastle International Airport

Mode	Percentage (Business Foreign)	Percentage (Leisure Foreign)	All Trips to Newcastle Airport
Car	39.4%	54.5%	60.7%
Taxi	44.4%	19.6%	24.3%
Bus / Coach	0.7%	1.1%	1.0%
National Rail	4.0%	2.8%	2.5%
Light Rail	11.5%	22.0%	11.0%
Other	0.0%	0.0%	0.5%
Total	100.0%	100.0%	100.0%

Access to Newcastle International Airport follows a similar pattern to Manchester Airport, with foreign visitors using cars far less than the airport's average. Overall, public transport accounts for 14.5% of surface access journeys to Newcastle Airport. For foreign leisure travellers, almost 26% of journeys are undertaken by public transport. This highlights the importance of public transport services for foreign visitors. Consequently, airport public transport services need to be simple to use for people unfamiliar with the UK transport system. Most of the public transport journeys are undertaken using light rail, which is to be expected as Tyne and Wear Metro directly serves a station at the airport. Services like the Tyne and Wear metro tend to be easier for foreign visitors to use than modes such as buses, as fixed, visible and named stops are provided.

Figure 5-22 - Origin of foreign business visitors departing from Newcastle International Airport

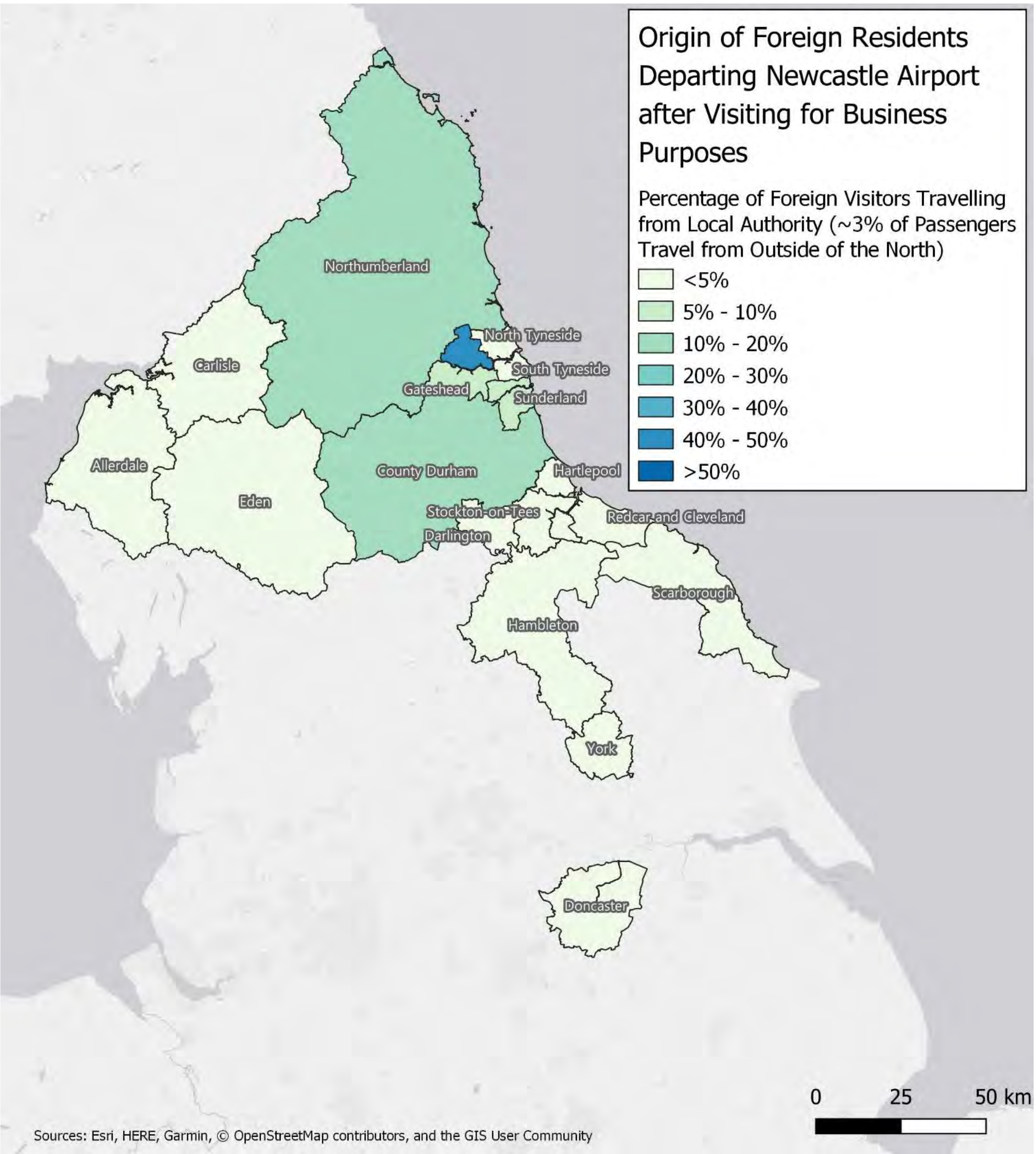


Figure 5-22 shows the areas foreign business visitors travelled from to access Newcastle Airport. The map identifies that Newcastle Airport caters for international business passengers that are predominantly travelling from the North East, largely from Newcastle-upon-Tyne. County Durham and Northumberland account for over 10% of origins, while Sunderland and Gateshead account for between 5-10% of origins. The airport's catchment for foreign business visitors also extends to the most northern local authorities in the North West and some areas of Yorkshire.

Figure 5-23 - Origin of foreign leisure visitors departing from Newcastle International Airport

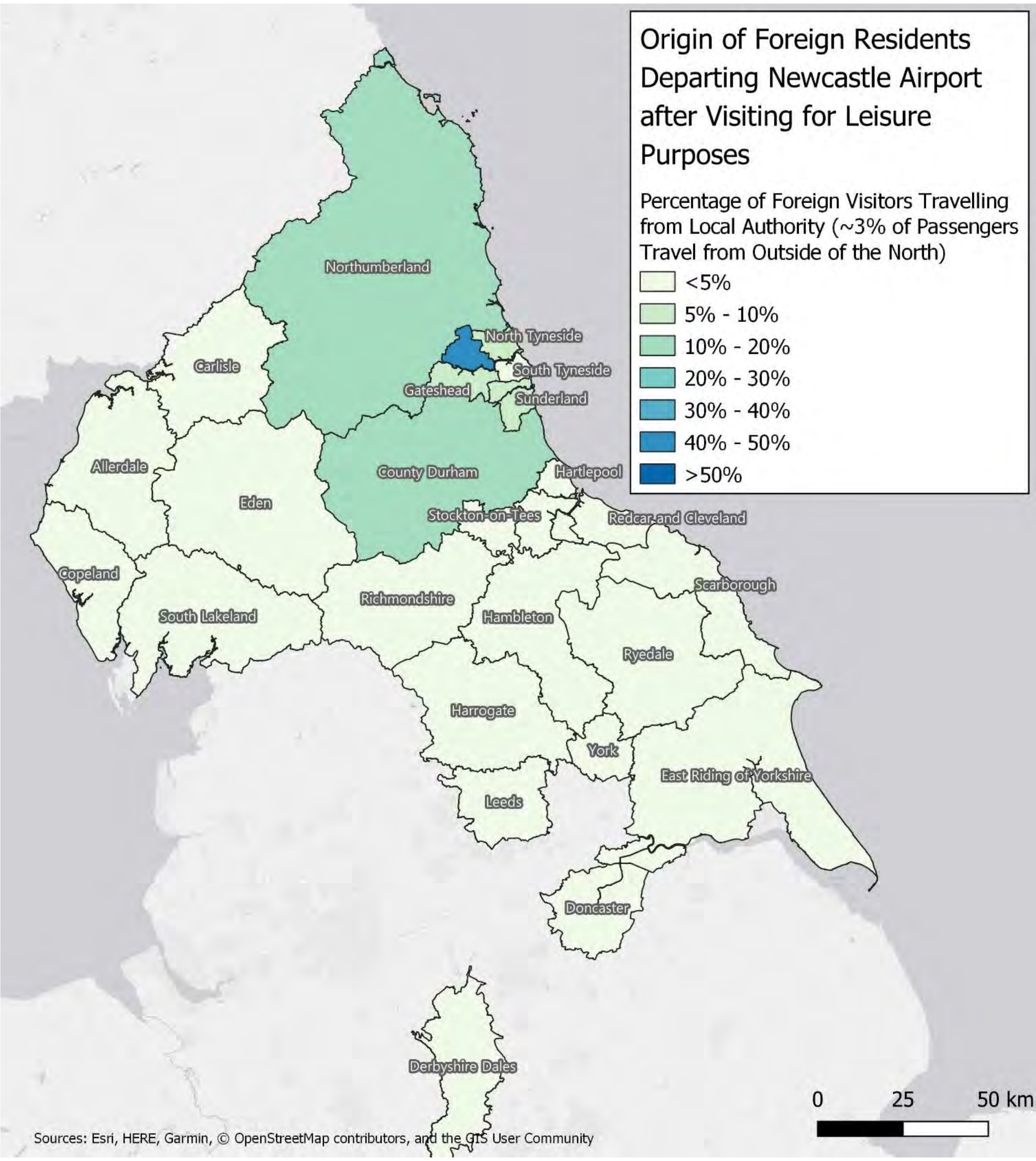


Figure 5-23 shows the areas foreign leisure visitors travelled from to access Newcastle Airport. The area from which foreign leisure visitors travelled to reach Newcastle Airport is wider than for foreign business travellers. As with business, the majority of visitors travel from Newcastle, Northumberland, County Durham, Gateshead and Sunderland. In particular, Newcastle accounts for around 40% of foreign leisure visitors using the airport. In addition to the North East, the airport acts as a gateway to Cumbria, North Yorkshire and some areas of West Yorkshire, the East Riding of Yorkshire and South Yorkshire.

5.4.3.3. Liverpool John Lennon Airport

Table 5-9 - Mode used when travelling to Liverpool John Lennon Airport

Mode	Percentage (Business Foreign)	Percentage (Leisure Foreign)	All Trips to Liverpool Airport
Car	46.1%	43.0%	56.4%
Taxi	39.1%	24.2%	24.0%
Bus / Coach	14.8%	31.5%	12.4%
National Rail	0.0%	1.2%	6.7%
Light Rail	0.0%	0.0%	0.0%
Other	0.0%	0.0%	0.5%
Total	100.0%	100.0%	100.0%

Table 5-9 shows the modes used to access Liverpool John Lennon Airport by foreign residents for both leisure and business purposes as well the mode share for all trips to Liverpool John Lennon Airport to provide a comparison.

The use of cars to access Liverpool John Lennon Airport by foreign visitors is below the airport's average mode share for car, in line with the North's other airports. However, unlike other airports in the North, car is more popular amongst business visitors as opposed to leisure visitors. In common with the North's other main airports, taxi usage is higher for foreign business travellers than foreign leisure visitors. Public transport usage is once again higher for foreign leisure visitors than all trips (nearly 33% versus 19%) although rail has a small mode share. The nearest rail station, Liverpool South Parkway, is 3 miles from Liverpool John Lennon Airport, and is accessed via a connecting bus service, meaning some journeys involving both a rail and bus service may be recorded as a bus journey within the data.

Figure 5-24 - Origin of foreign business visitors departing from Liverpool John Lennon Airport

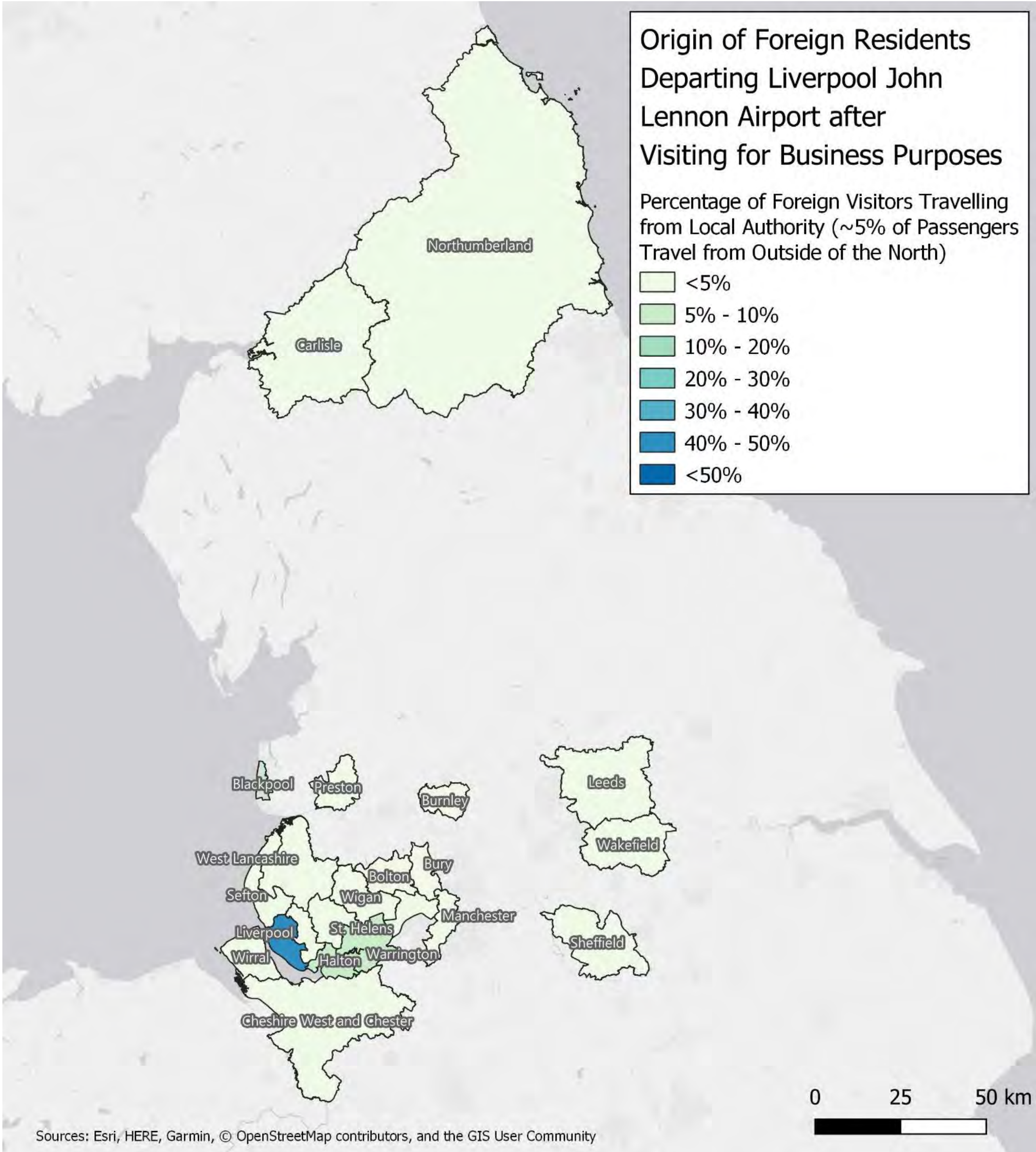


Figure 5-24 shows the areas foreign business visitors travelled from to access Liverpool John Lennon Airport. Nearly 50% of foreign business visitors travelling via Liverpool John Lennon Airport originate from the local authority of Liverpool. Additionally, over 5% of foreign business visitors are travelling from Halton, Warrington and Blackpool. Looking further afield, the western districts of Greater Manchester, larger settlements of Lancashire (Preston, Burnley) and larger settlements in Yorkshire (Leeds, Sheffield and Wakefield) are all origins of foreign business visitors travelling via Liverpool John Lennon Airport. A small number of origins for foreign business visitors are also recorded from Northumberland and Carlisle, despite the availability of alternative airports nearby.

Figure 5-25 - Origin of foreign leisure visitors departing from Liverpool John Lennon Airport

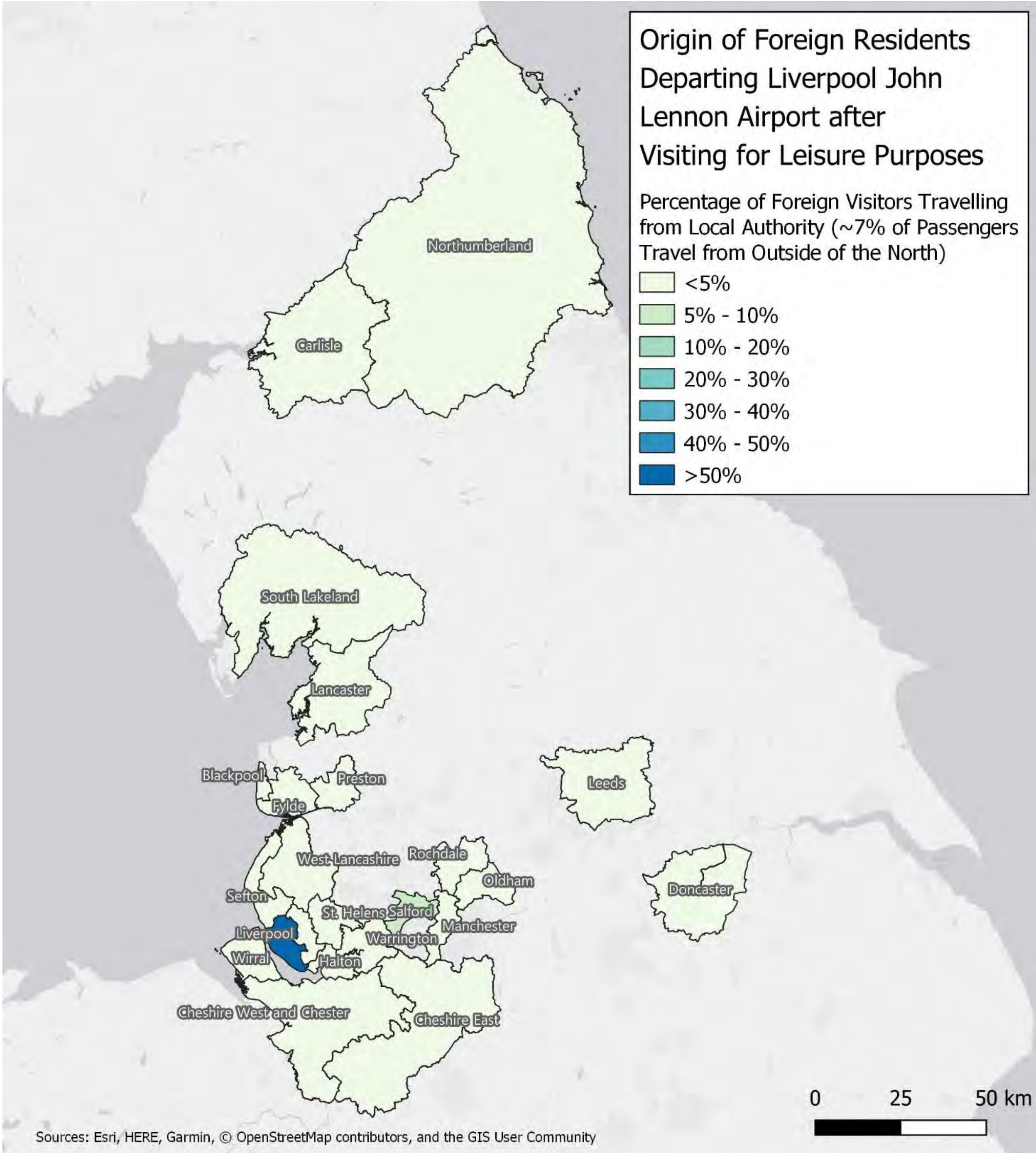


Figure 5-25 shows the areas foreign leisure visitors travelled from to access Liverpool John Lennon Airport. While generally following a similar pattern to that observed for foreign business travellers, an even greater proportion of leisure visitors travel from Liverpool. This likely reflects Liverpool's standing as an international tourist destination. Additionally, 5 – 10% of foreign leisure travellers travel from the Salford area to Liverpool. Some of the larger urban areas from Lancashire and Yorkshire are also identified as origins for foreign leisure travellers using Liverpool John Lennon Airport. Again, Northumberland and Carlisle also account for small numbers of foreign leisure visitors travelling via Liverpool John Lennon Airport, alongside South Lakeland and Lancaster.

5.4.3.4. Leeds Bradford Airport

Table 5-10 - Mode used when travelling to Leeds Bradford Airport

Mode	Percentage (Business Foreign)	Percentage (Leisure Foreign)	All Trips to Leeds Bradford Airport
Car	9.3%	68.0%	62.6%
Taxi	68.7%	12.8%	27.0%
Bus / Coach	14.5%	14.6%	7.2%
National Rail	7.5%	4.6%	3.1%
Light Rail	0.0%	0.0%	0.1%
Other	0.0%	0.0%	0.1%
Total	100.0%	100.0%	100.0%

Table 5-10 shows the mode used to access Leeds Bradford Airport by foreign residents for both leisure and business purposes as well the mode share for all trips to Leeds Bradford Airport to provide a comparison.

Leeds Bradford Airport had relatively few foreign business trips in 2017 and mainly caters for leisure trips. Consequently, data on the mode split for business users may not be as reliable. However, similar trends can still be seen. Interestingly, foreign leisure visitors have higher car usage than average (68% versus 63%). This may be a reflection of Leeds Bradford having relatively limited public transport options compared to other northern airports. Public transport usage is higher for foreign leisure travellers than UK passengers, which is mostly undertaken by bus as there is no direct rail service to Leeds Bradford Airport currently.

Figure 5-26 - Origin of foreign business visitors departing from Leeds Bradford Airport

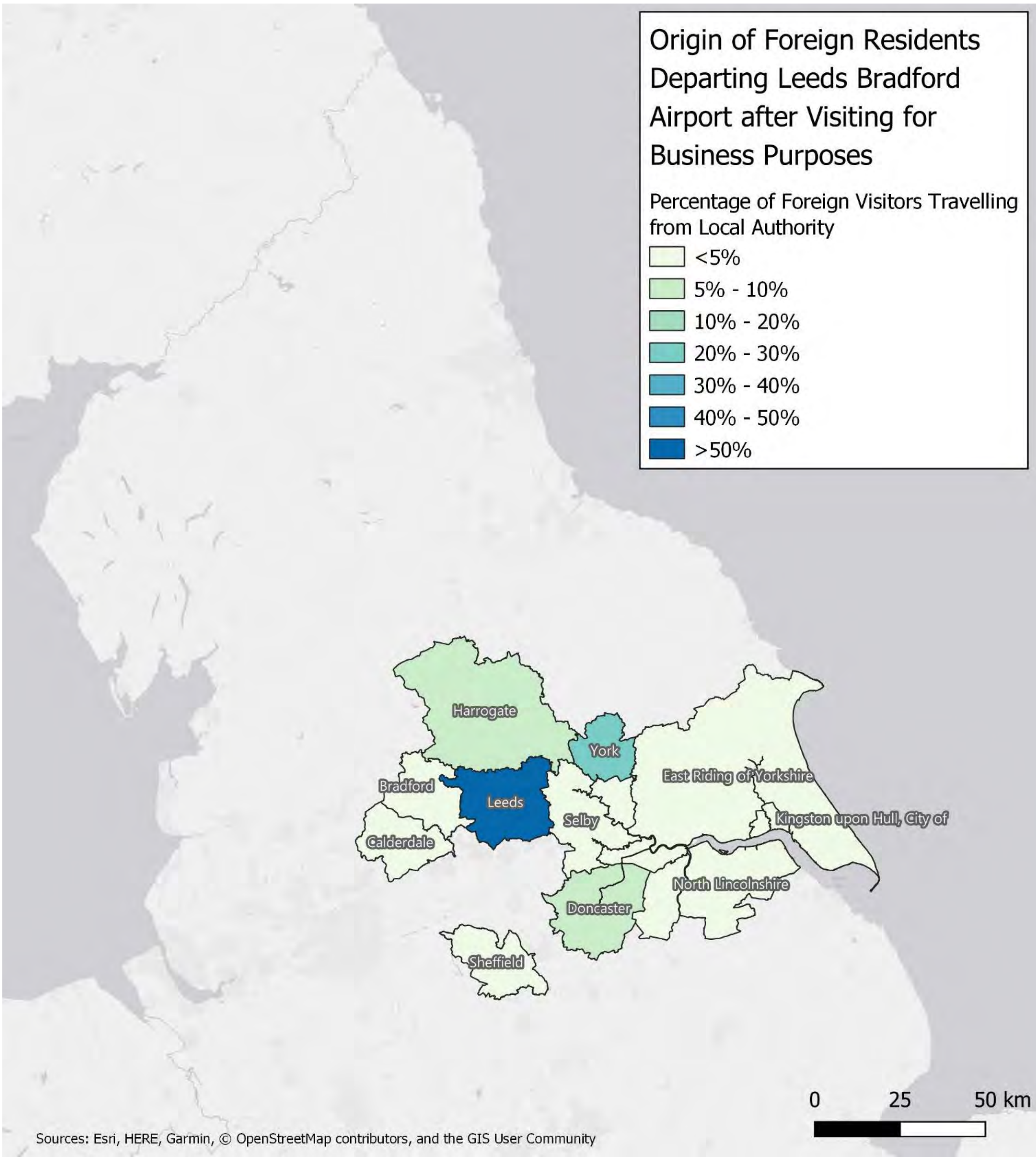


Figure 5-26 shows the origins of foreign business visitors using Leeds Bradford Airport. As previously mentioned, foreign business visitors account for relatively few passenger movements at Leeds Bradford Airport. Over 50% of these business visitors have travelled from Leeds, with a large proportion also travelling from the neighbouring city of York.

Figure 5-27 - Origin of foreign leisure visitors departing from Leeds Bradford Airport

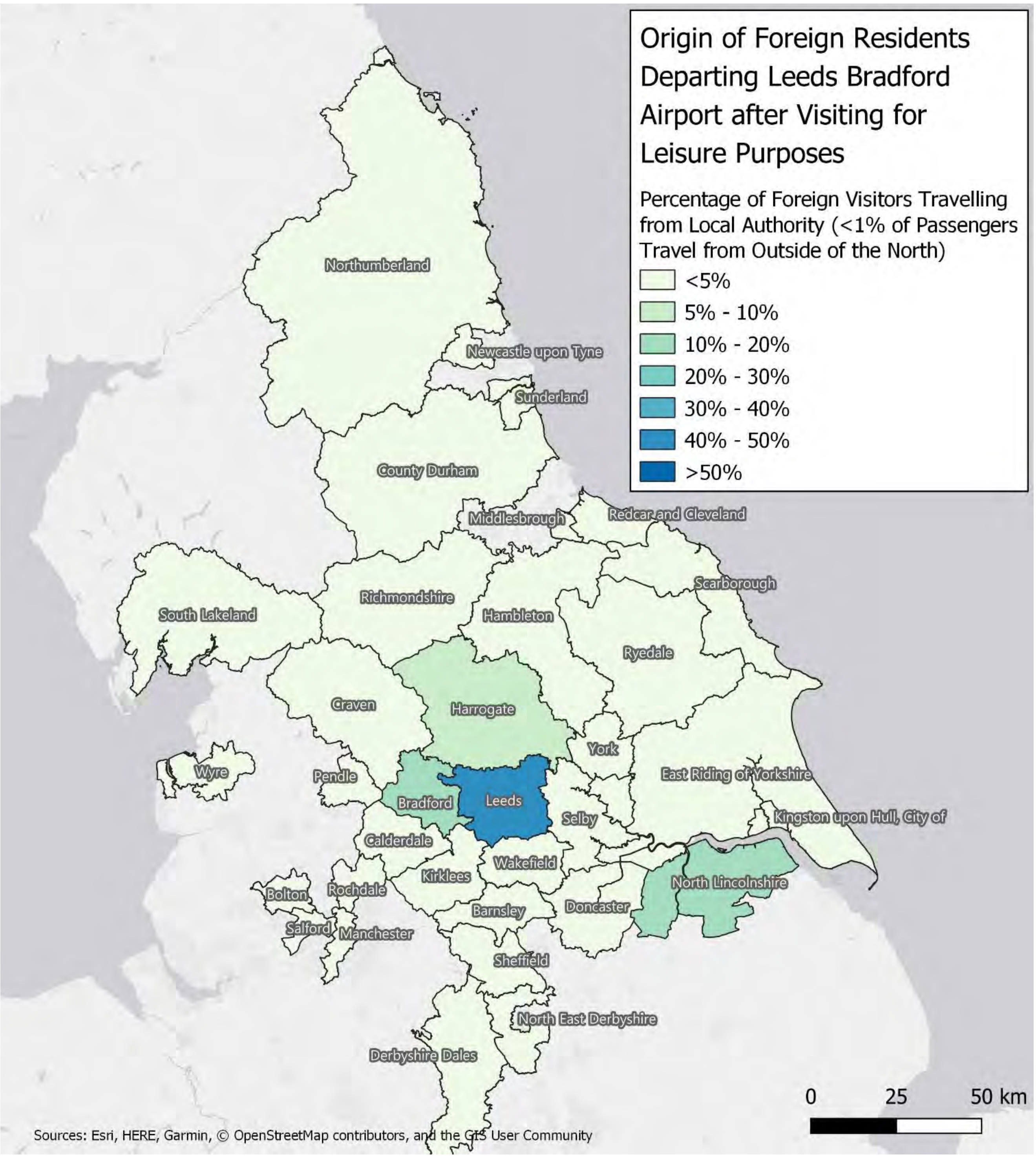


Figure 5-27 shows the origins of foreign leisure visitors using Leeds Bradford Airport. The airport can be seen to have a much greater catchment for foreign leisure visitors than foreign business visitors. Again, Leeds accounts for most origins, followed by Bradford, North Lincolnshire, and Harrogate. The remaining local authorities account for less than 5% of foreign leisure visitors travelling via Leeds Bradford Airport; this includes many parts of Yorkshire, Greater Manchester, and areas in the North East, Cumbria and Lancashire.

5.5. Accessibility Analysis

5.5.1. Introduction

As part of this study a high level TRACC accessibility analysis assessment has been used to model the impacts of HS2 and certain Northern Powerhouse Rail (NPR) interventions on journey times for selected key visitor economy journeys. The following NPR interventions, alongside HS2, have been modelled as part of the 'do something' scenario:

- Liverpool to Manchester Piccadilly (Calling at Warrington Bank Quay, Manchester Airport HS2) with a six train per hour frequency.
- Manchester Piccadilly to Leeds (Calling at Bradford Interchange) with a four train per hour frequency.
- Manchester Piccadilly to Sheffield (with some services calling at Stockport) with a four train per hour frequency.
- Sheffield to Leeds (with alternate service stopping at a new Rotherham station and a proposed Dearne Valley station) with a four train per hour frequency.

It is important to note that at the time of writing this report, none of these interventions have been finalised and there remain multiple options for station locations, journey time improvements and services. These interventions have been chosen to show the high-level impacts of improving journey times between the North's cities and should not be considered as a definitive future scenario. The 'do minimum' model is based on January 2020 public transport timetables and no existing services have been edited, therefore on certain lines such as the West Coast Mainline north of Wigan and East Coast Mainline north of York, it has been assumed that HS2 services would be in addition to current services. Other NPR services / interventions including Newcastle to Leeds, Leeds to Hull and Sheffield to Hull have not been included as they are expected to be upgrades to existing infrastructure, and therefore would require significant editing of current public transport timetables that was not possible within the scope of this project.

The journey time in both the 'do-minimum' and 'do-something' scenario for three locations have been modelled for this report. These are Manchester Airport, Keswick and Scarborough. Manchester Airport was chosen as it is a hub for international travel to the North and is also expected to be served by both the HS2 and NPR rail networks. It also acts as a proxy for improved accessibility to the main northern cities. Keswick was chosen to represent a key rural tourism destination in the North West, while Scarborough was chosen to represent a key coastal tourism destination in the east. In both Keswick and Scarborough, a large proportion of businesses and employment are part of the visitor economy, making these places particularly dependent on their ability to continue to attract and transport large numbers of visitors.

5.5.2. Results

5.5.2.1. Manchester Airport

Figure 5-28 shows public transport accessibility from Manchester Airport as of January 2020. Figure 5-29 shows public transport accessibility from Manchester Airport with the addition of HS2 and the aforementioned NPR services integrated into the current transport network. As Manchester Airport HS2 station is planned to be built away from the current transport hub, a service with a frequency of 10 services per hour was added to link the current transport hub with the HS2 station. This simulates the expected Metrolink service linking the two stations.

From comparisons between Figure 5-28 and Figure 5-29, it can be seen that the introduction of NPR and HS2 services significantly increases connectivity from Manchester Airport. In the January 2020 timetable, central Liverpool is between 75 minutes and 90 minutes from Manchester Airport. After introduction of NPR services, central Liverpool can be reached within 45 minutes from the existing Manchester Airport railway station. The improved connectivity between Liverpool and Manchester Airport impacts the wider Liverpool City Region, a significant proportion of which was beyond 120 minutes journey time in do minimum scenario. Similar to Liverpool, journey times from Chester reduce from greater than 90 minutes to approximately 60 minutes. Other significant improvements in accessibility can be seen in the east. Bradford also sees significant accessibility improvements, with journey times decreasing from over 105 minutes to 60 minutes. As core intercity journey times are reduced, large areas of West Yorkshire become accessible within 2 hours from Manchester airport by using local rail and bus services to access NPR. A similar pattern can be seen in South Yorkshire but the journey time reduction is less pronounced.

Figure 5-28 - Public transport accessibility to Manchester Airport (Do Minimum)

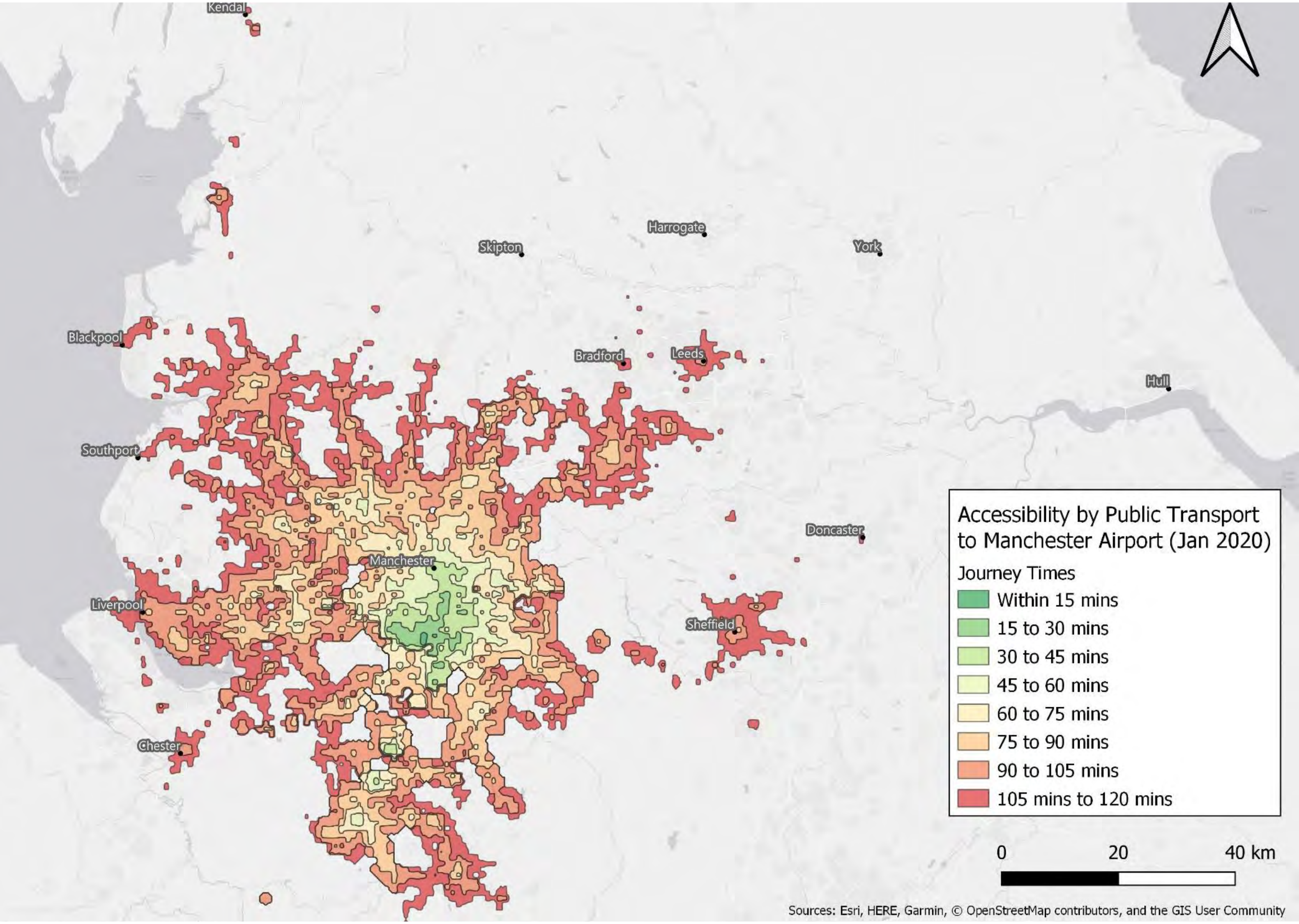
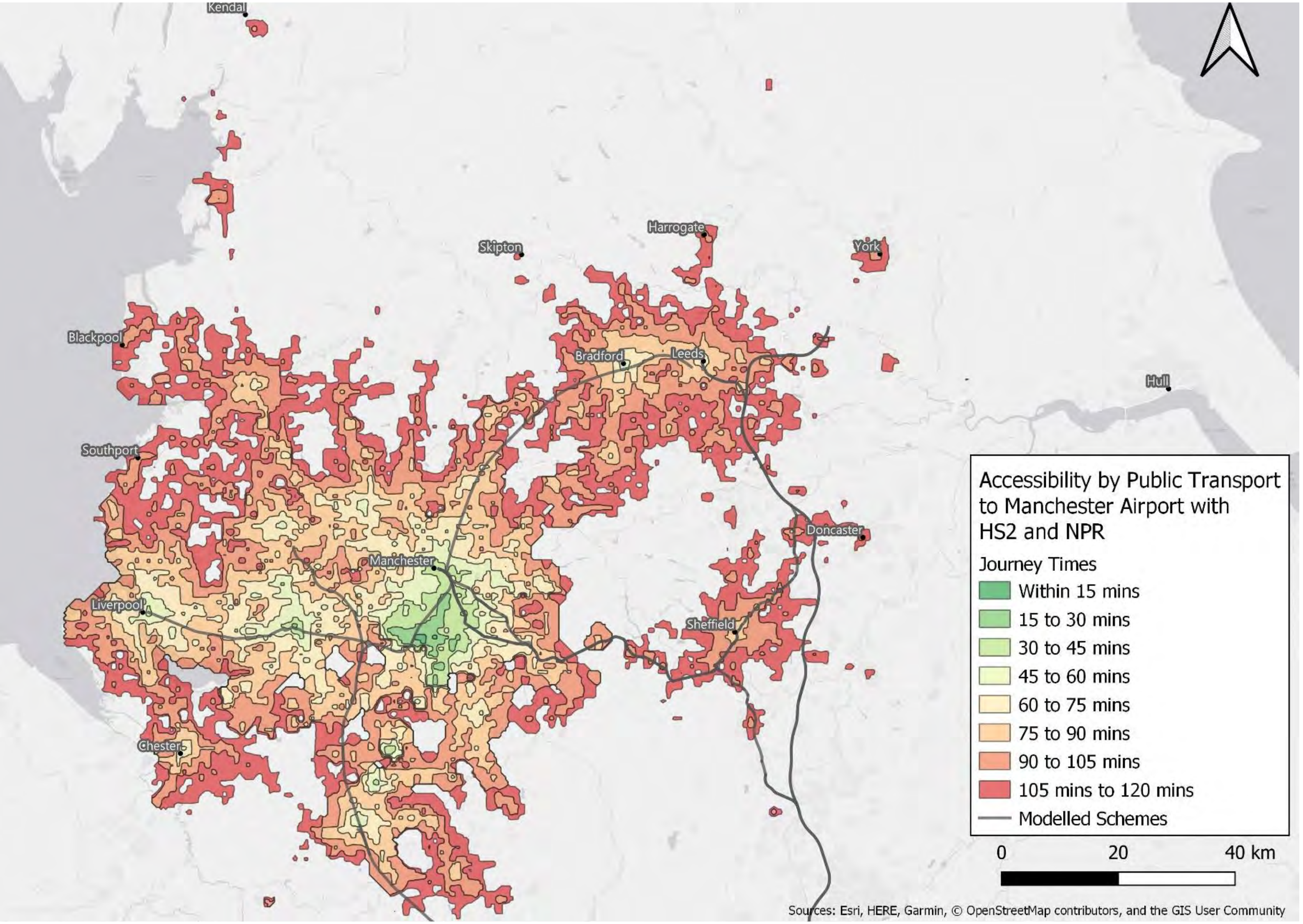


Figure 5-29 - Public transport accessibility to Manchester Airport (Do Something)



5.5.2.2. Scarborough

Figure 5-30 and Figure 5-31 show public transport accessibility from Scarborough as of January 2020 (left) and with HS2 and the aforementioned NPR services integrated into the current transport network.

The maps show that Scarborough has relatively poor accessibility and can only be accessed within two hours from a small number of urban areas, largely as a result of the town being situated on a branch away from core mainline rail routes. The main areas that are accessible within 2 hours are Hull, York and central Leeds. The addition of NPR and HS2 has some small impacts on accessibility to Scarborough. For example, Bradford becomes accessible to the town within 2 hours as a result of the new Manchester – Leeds line via the centre of the city. Accessibility from Darlington also improves as result of the additional HS2 services added north of York. This analysis highlights how that the low frequency of rail services to Scarborough (one per hour) limits accessibility. For example, while Doncaster has a theoretical journey time of 1hour 25 minutes (25 minute journey from York, and less than 60 minute journey time from York to Scarborough), real world journey times are close to 2 hours suggesting long interchange times in the current timetable. Additionally, Toton HS2 to Scarborough has a theoretical journey time of approximately 1 hour 30 minutes suggesting that day visits would become possible from the East Midlands to Scarborough. However, with a proposed frequency of one train per hour from Toton to York, and a frequency of one train per hour from York to Scarborough, it is possible that interchange times could make this journey lengthier and therefore less attractive.

5.5.2.3. Keswick

Figure 5-32 and Figure 5-33 show public transport accessibility from Keswick as of January 2020, and with HS2 and the aforementioned NPR services integrated into the current transport network.

The analysis identifies that Keswick has poor public transport connectivity, meaning that generally only settlements within Cumbria are within 2 hours public transport journey time. In the January 2020 timetable Lancaster is the only settlement within the North and outside of Cumbria that can be reached within 2 hours. Following the introduction of NPR and HS2 services, Preston and Wigan become accessible from Keswick within 2 hours. This is a result of timetable and rolling stock improvements resulting from the introduction of HS2 services, generating some small journey time improvements. Despite this, it will remain important to ensure interchange between rail and bus services at Penrith is kept to a minimum to maximise connectivity and reduce journey times where possible.

5.5.3. Implications for the North’s Visitor Economy

As Figure 5-29 shows, accessibility within the North of England is considerably improved following the introduction of HS2 and NPR services, which will significantly reduce journey times between the North’s core cities and key gateways, therefore increasing the population catchment living within 2 hour travel time by public transport from some of the North’s key destinations and most significant visitor attractions. The cities directly served by NPR and HS2 services stand to gain the most following their introduction, followed by neighbouring places which have frequent, fast, and easy connections to and from the new network.

While the connectivity and journey time benefits brought to places directly served by the HS2 and NPR networks are well established, the impacts of their introduction on places which will not be directly served still needs further study and exploration. The high-level analysis undertaken for this study has demonstrated that many of the North’s cities will benefit from significantly improved connectivity and journey times. However, places not directly served by HS2 and NPR will not benefit to the same extent and will generally receive more modest improvements to connectivity and journey times due to the continuing need to interchange onto secondary rail services or local bus services. From the perspective of the North’s visitor economy, these places have great significance. For example, in the Boroughs of Scarborough and Allerdale, more than 10% of businesses and employment directly relate to the visitor economy, with many more being supported indirectly through the supply chain, making the sector especially important to the success and vitality of those places. In these and other similar places, it is particularly important to ensure the visitor economy is adequately supported to ensure its continued strength and sustainability. As the HS2 and NPR networks establish themselves, they will reshape the relationship between time and space for many in the North, making previously inaccessible places more accessible. It is important to understand how the benefits of this investment can be provided to as many parts of the North as possible, either through the provision of direct services, or high quality, frequent connecting services which enable seamless connectivity across the North.

Figure 5-30 - Public transport accessibility to Scarborough (Do Minimum)

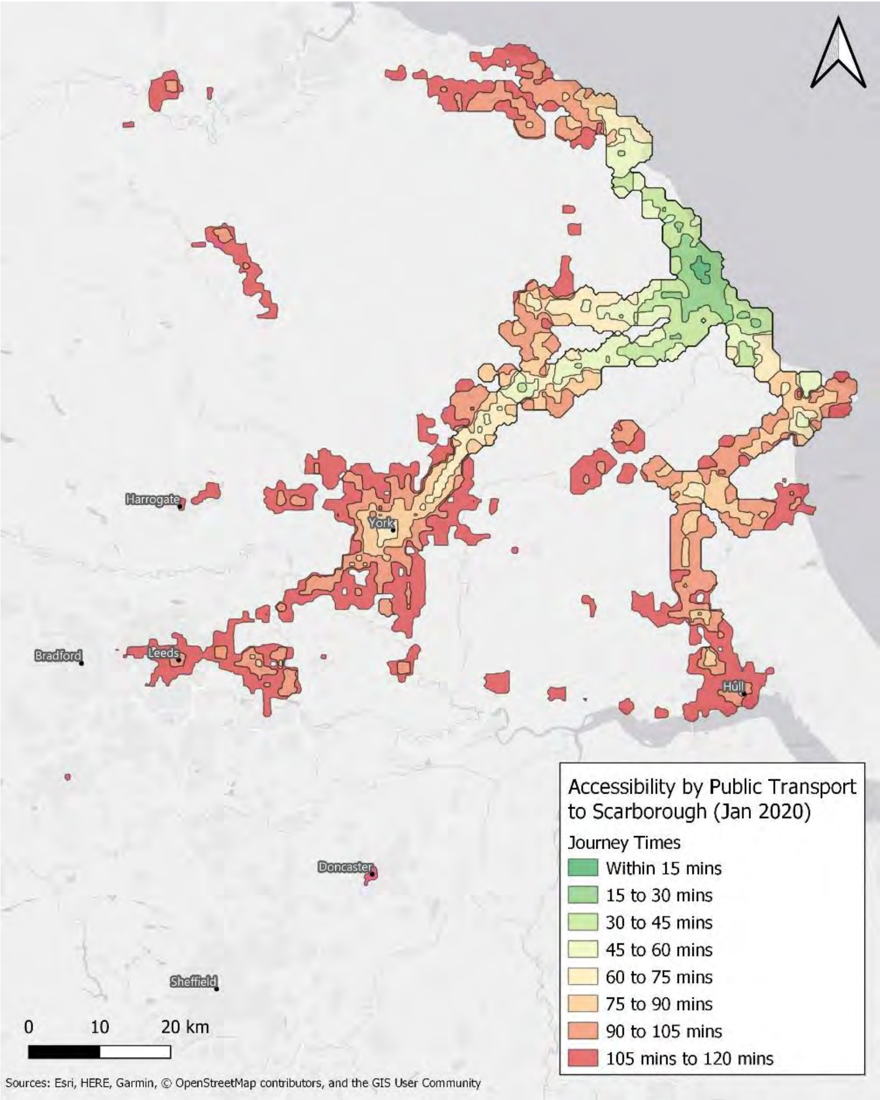


Figure 5-31 - Public transport accessibility to Scarborough (Do Something)

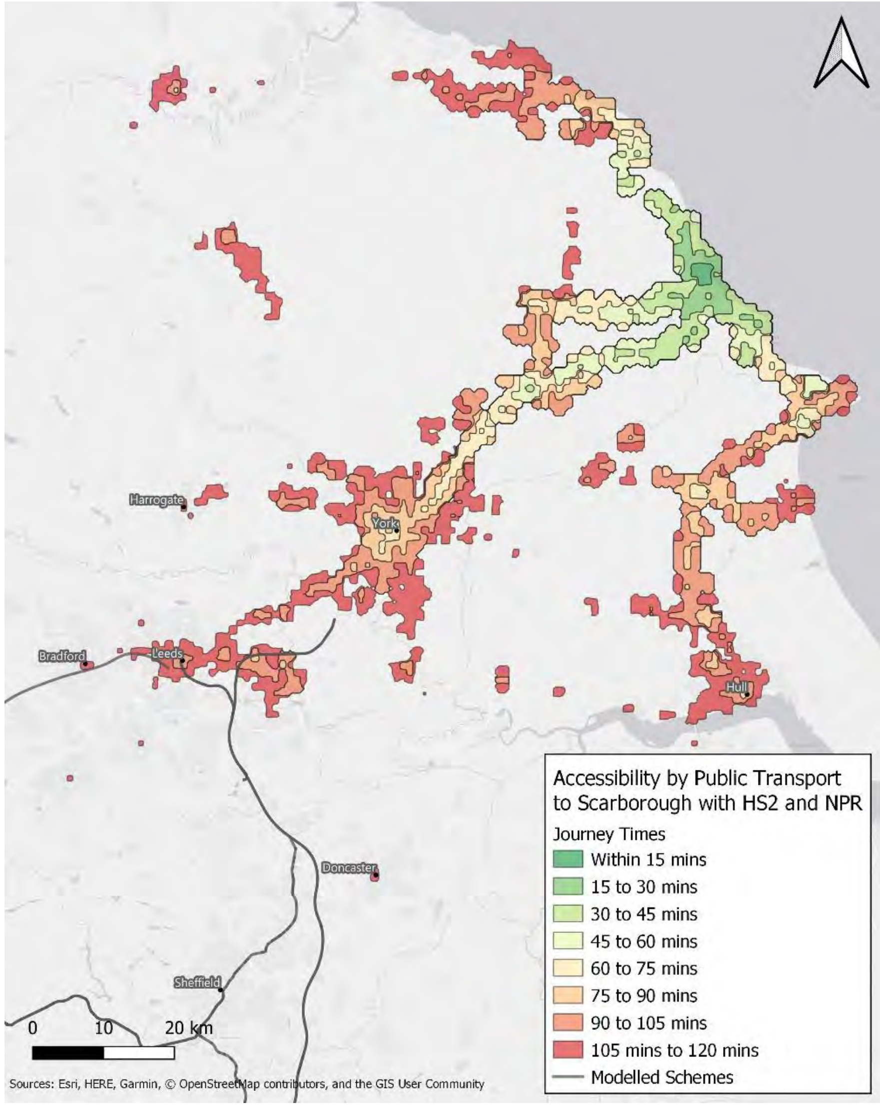


Figure 5-32 - Public transport accessibility to Keswick (Do Minimum)

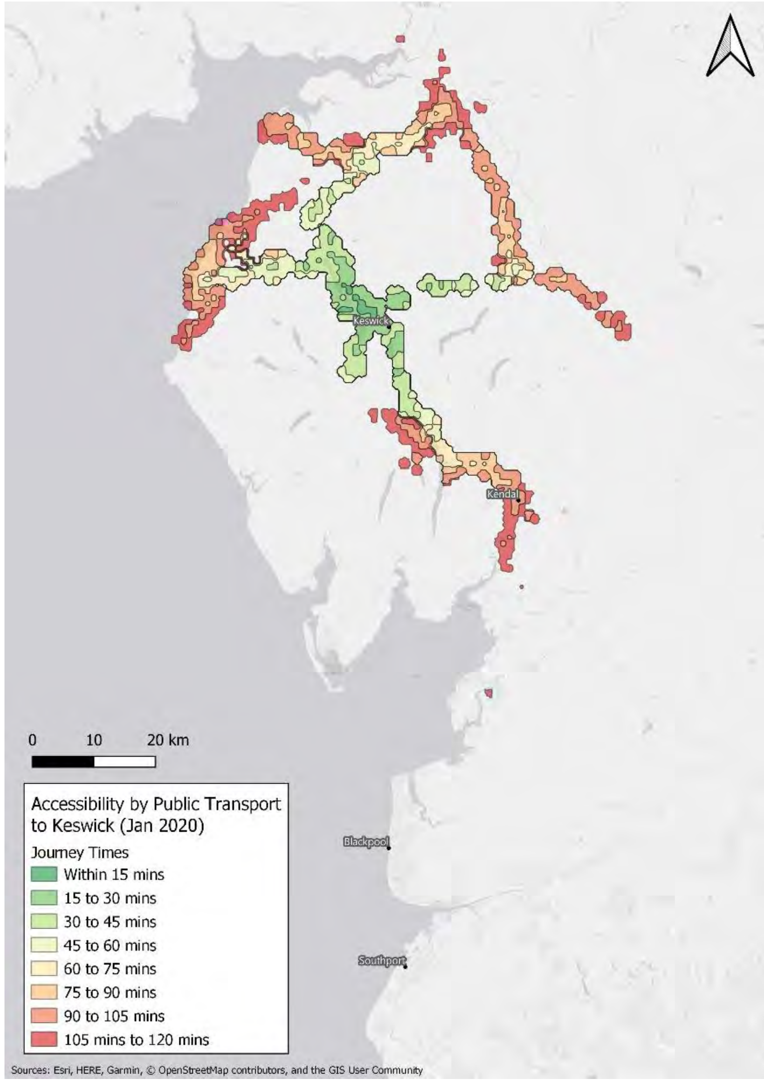
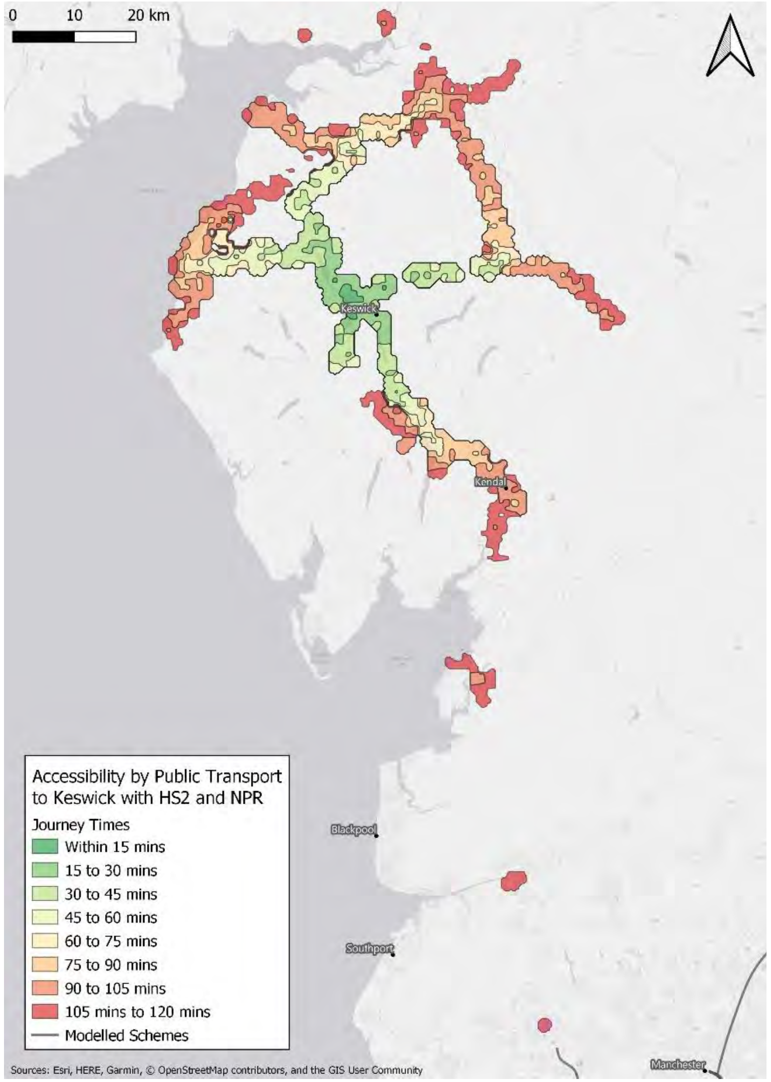


Figure 5-33 - Public transport accessibility to Keswick (Do Something)



5.5.4. Bus Service Frequency

In addition to the journey time contour analysis outlined above, a TRACC bus frequency calculation was created to identify parts of the North with restricted public transport services. Analysis was undertaken using the July 2019 and January 2020 timetables to understand the extent to which year-round bus services are available within the North. Figure 5-34 shows the average hourly public transport frequency at all stops in the North between 10:00 – 16:00 on a typical weekday for the July 2019 timetable. Figure 5-35 provides equivalent frequency information from the January 2020 timetable.

Figure 5-34 – Weekday daytime bus service frequency, July 2019

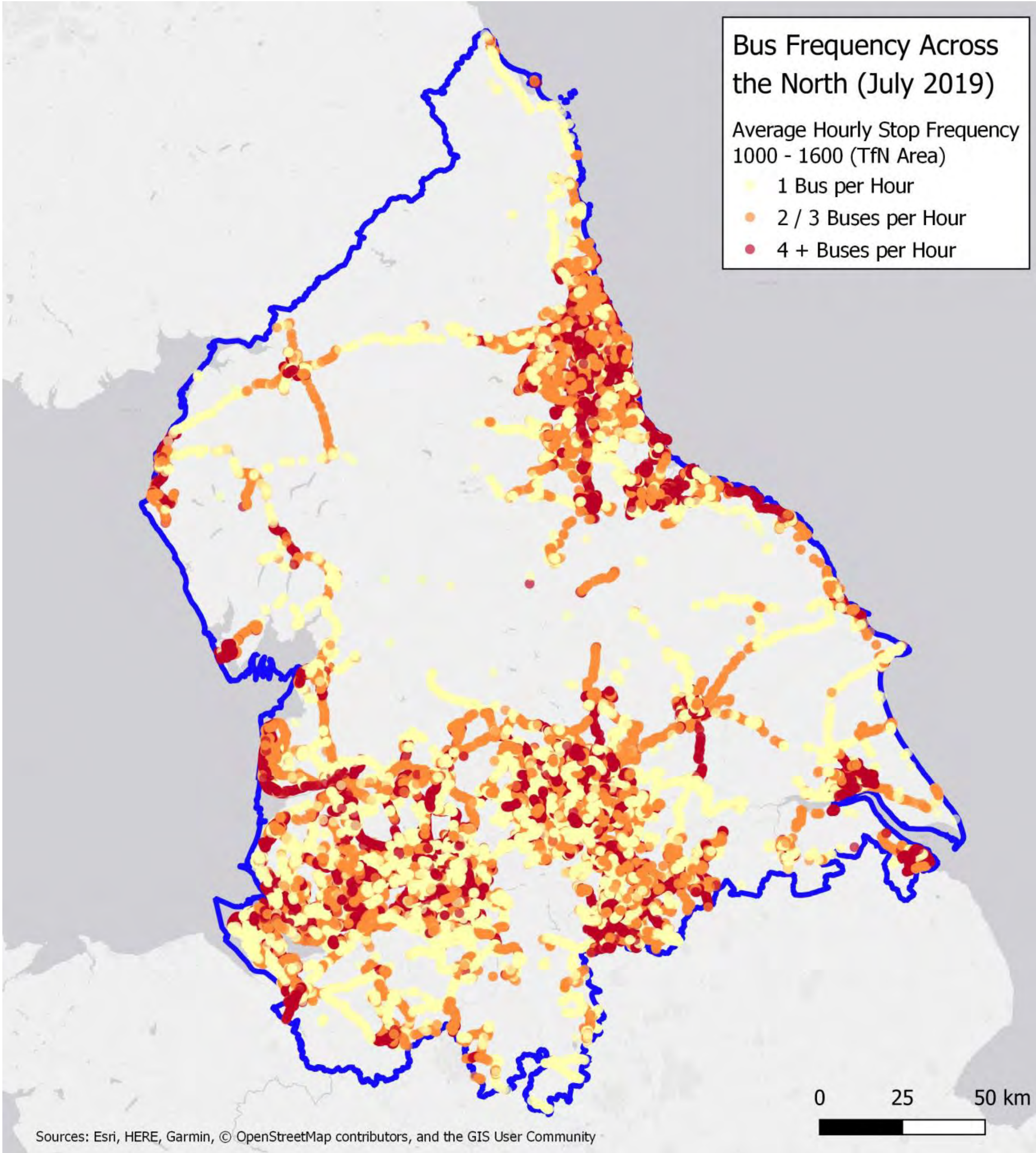


Figure 5-35 – Weekday daytime bus service frequency, January 2020

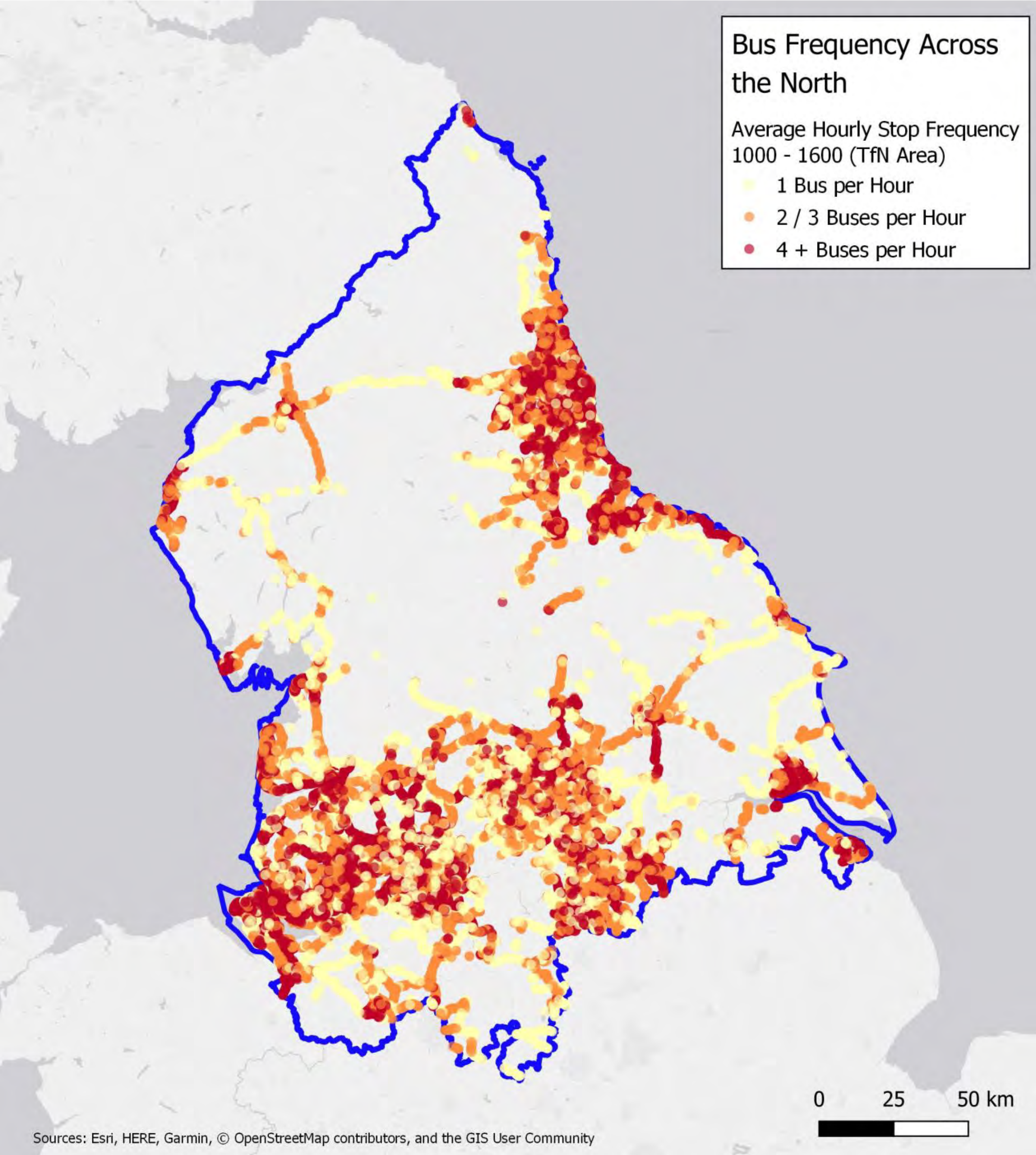


Figure 5-34 shows bus routes with at least 1 bus service in every hour between 10:00 – 16:00 in the July 2019 timetable. Figure 5-35 provides equivalent information on the January 2020 timetable. In many rural areas, bus services are very sparse, even during daytime periods, with very few routes having a greater than hourly frequency. Figure 5-34 identifies that the July 2019 timetable features a small number of additional services in Cumbria, North Yorkshire, and Northumberland, running to or through some of the North's most remote and scenic areas. While the availability of these services during the summer is beneficial, the lack of a year-round public transport offer is a potential barrier to the use of public transport amongst visitors to the North.

Figure 5-36 – Weekday evening bus service frequency, July 2019

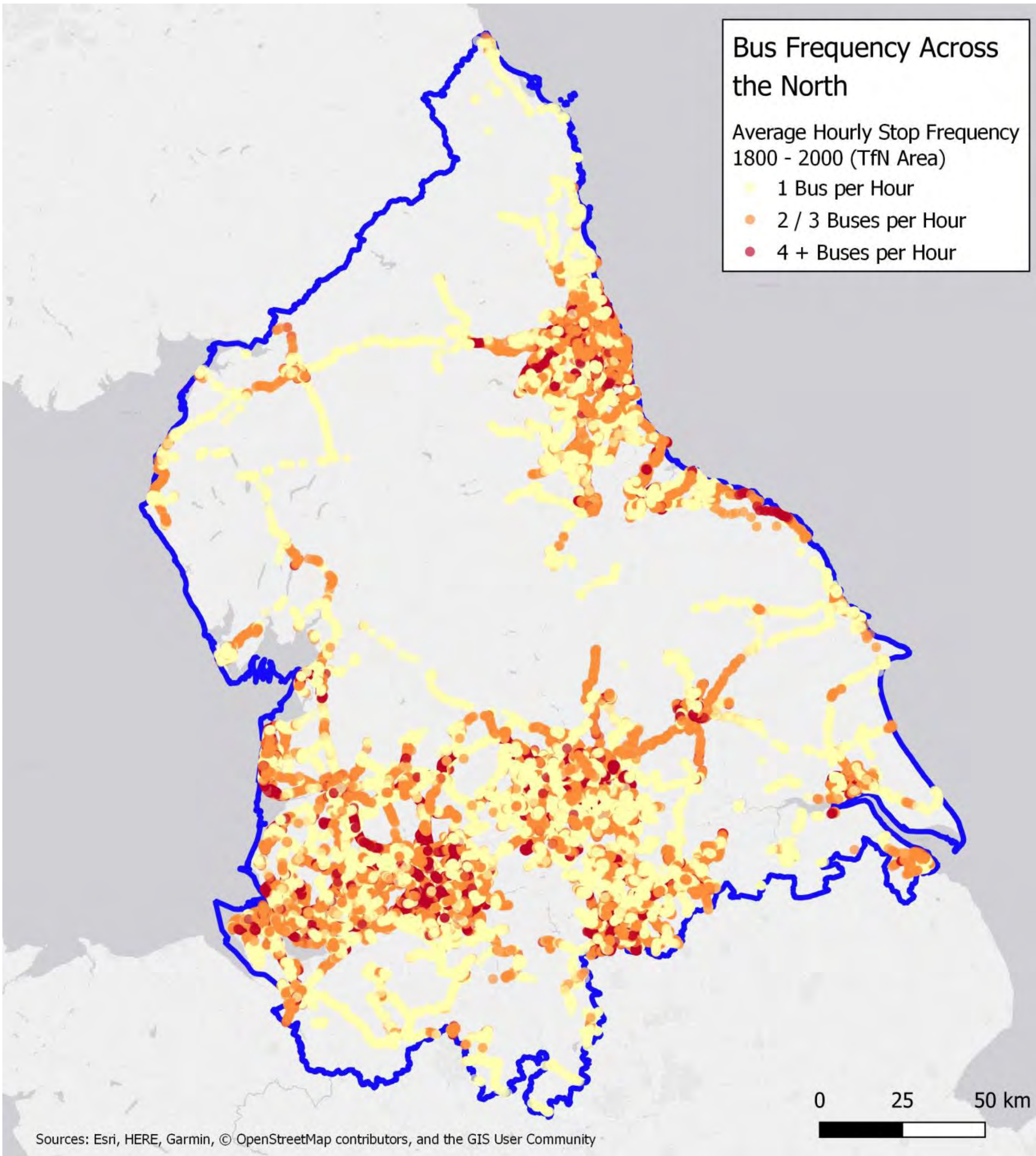


Figure 5-37 – Weekday evening bus service frequency, January 2020

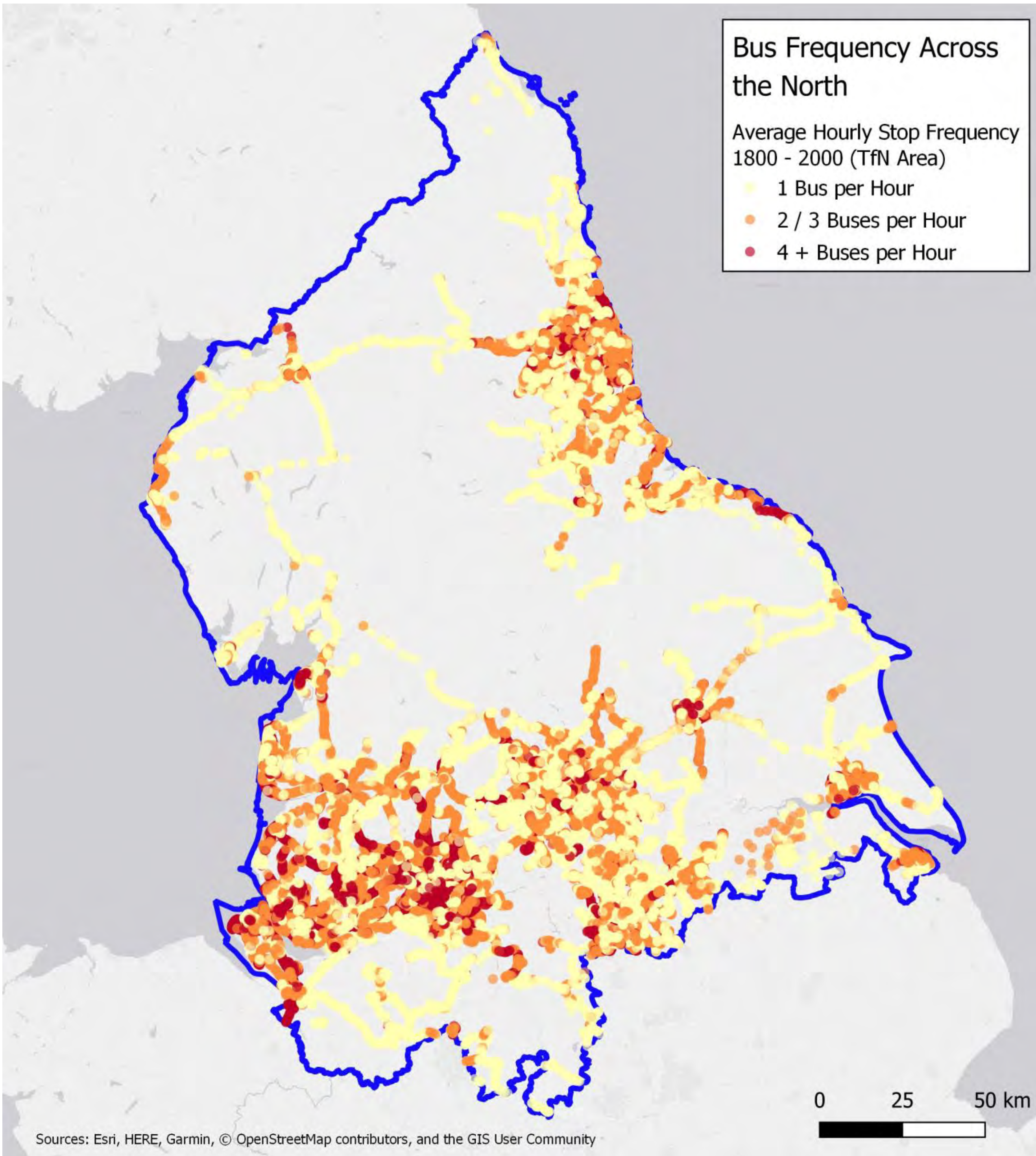


Figure 5-36 shows the average hourly public transport frequency at all stops in the North between 18:00 – 20:00 on a typical weekday for the July 2019 timetable. Figure 5-37 shows the average hourly public transport frequency at all stops in the North between 18:00 – 20:00 on a typical weekday for the January 2020 timetable. Evening journeys are important to the visitor economy, as visitors travel to access services such as restaurants or return to their accommodation from a day trip. In both the July 2019 and January 2020 timetables, bus frequencies are considerably lower in the evening, especially outside the core of the North's major urban areas. In particular, South Yorkshire, West Yorkshire and the North East see large reductions in frequencies outside of major urban areas. Bus services in the North's rural visitor economy hotspots see significant reductions in frequency, potentially deterring their use by visitors.

Figure 5-38 – Saturday daytime bus service frequency, July 2019

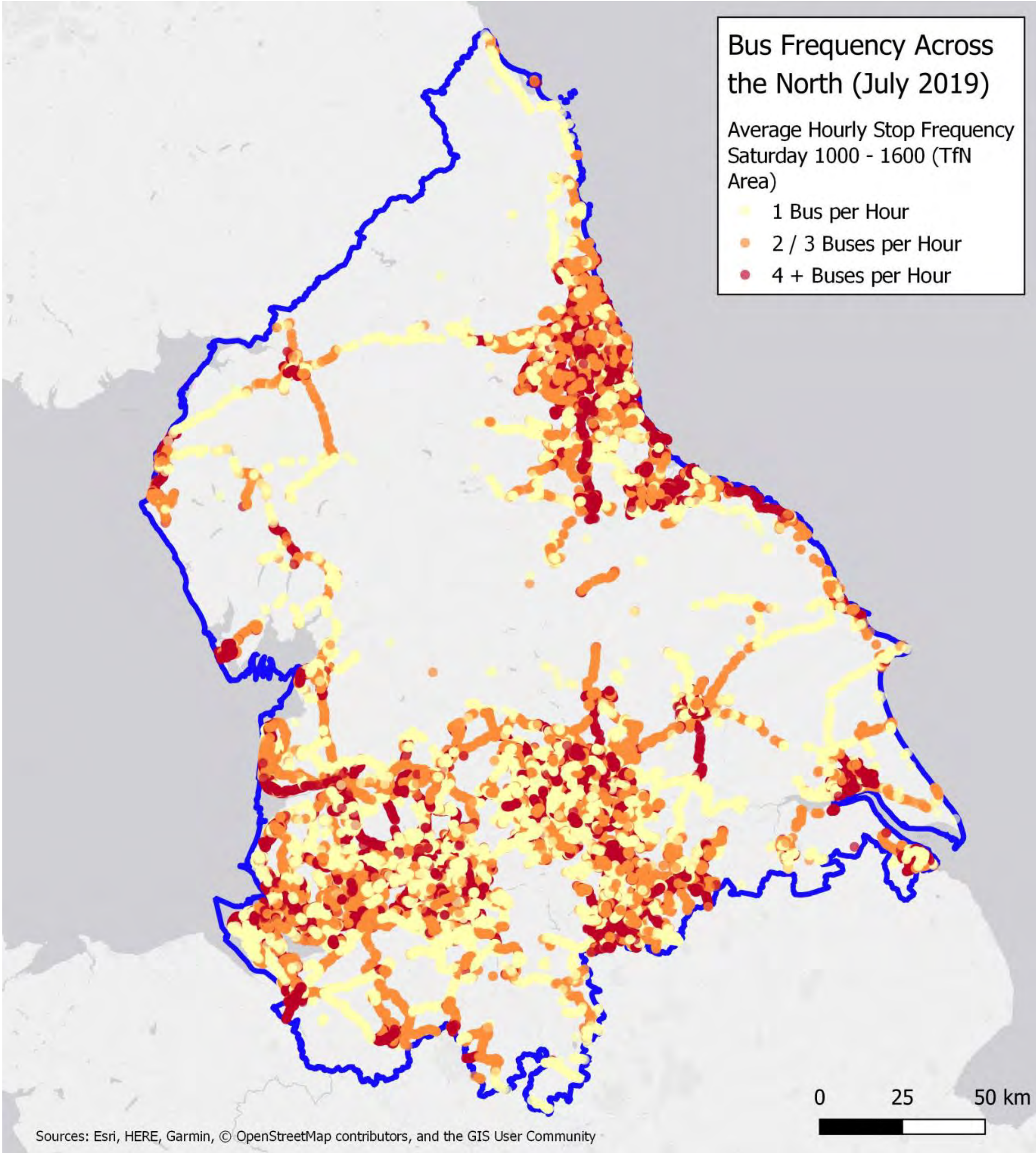


Figure 5-39 - Saturday daytime bus service frequency, January 2020

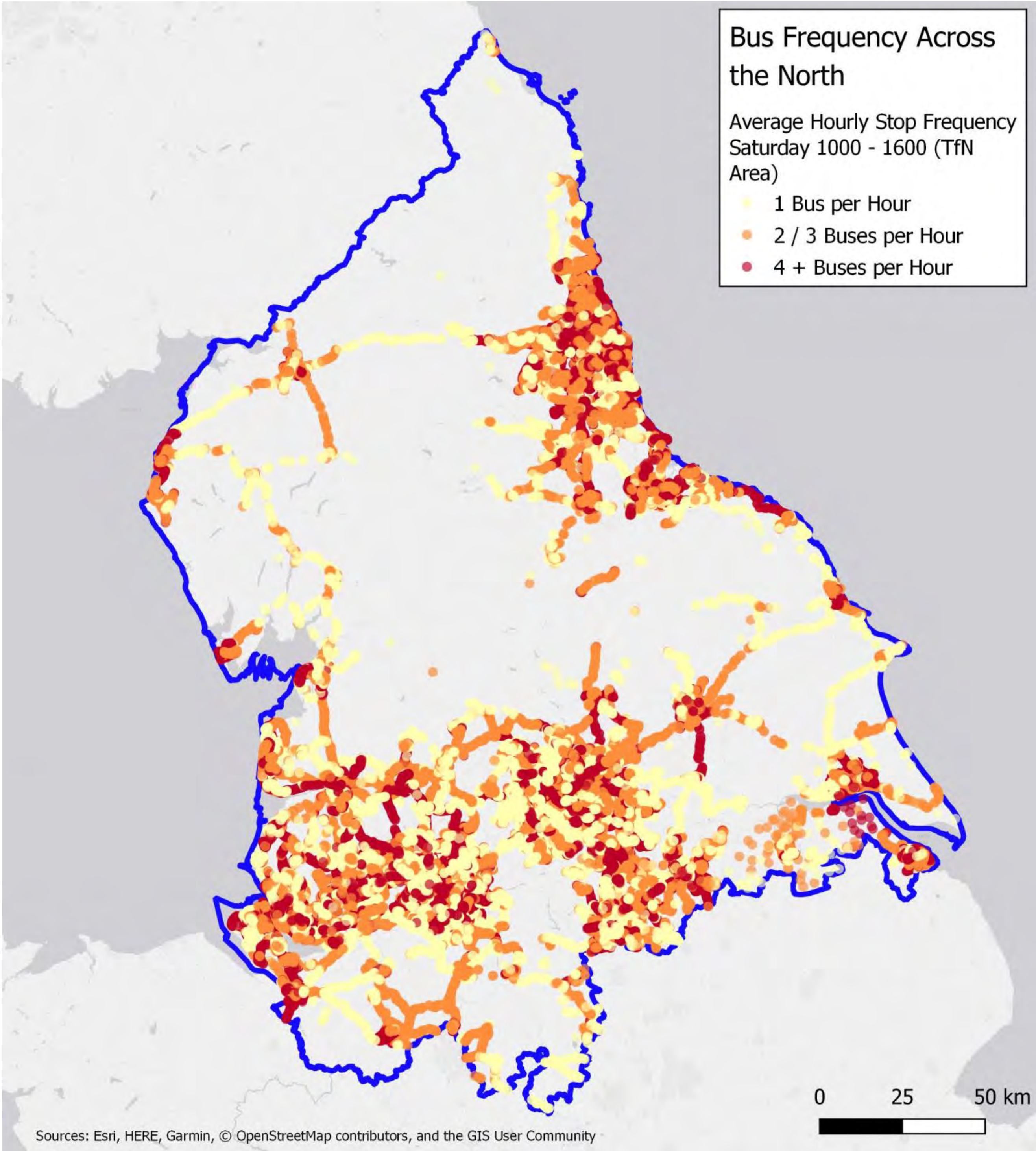


Figure 5-38 provides an overview of July 2019 Saturday daytime bus frequencies. Figure 5-39 provides equivalent information for the January 2020 timetable. As identified previously, bus coverage in the North can be observed to reduce in January 2020 timetable, with a number of coastal and rural routes operating at a lower frequency, or not operating. These service reductions mainly affect Cumbria, Northumberland, and North Yorkshire.

5.6. Conclusions

Long Distance Trips to the North

- Generally, visitor trips to / from the North are for holidays, business trips or visiting friends, with the largest flows being from urban and rural areas outside the North into the North's urban areas.
- Journeys to / from the North are generally in line with the national average; around 78% of journeys to the North are made by car, and 17% by rail. There is variation in the mode share of individual flows, with a larger proportion of visitors from London travelling to the North by rail. Non-London flows are generally dominated by the private car, even those between large urban areas such as the West Midlands and Greater Manchester.

Long Distance Trips within the North

- The largest flows broadly fall into three distinct categories:
  - Flows between large urban areas to rural areas
  - Flows between large urban areas
  - Flows between large urban areas and coastal areas.
- For long distance visitor journeys within the North, car is the principal mode, with 85% of long-distance trips within the North being via car in comparison to 79% of trips in Great Britain as whole.

Trips to/from a Holiday Base within the North

- Active travel modes such as cycling and walking are popular for shorter trips (less than 5 miles in length) to / from a holiday base.
- Taxis accounted for a higher proportion of trips to / from holiday bases than the national average, and public transport accounted for a lower proportion of trips than the national average.
- Coastal resorts and rural areas generally see a higher proportion of holiday base trips undertaken by walking. Public Transport usage from holiday bases is higher in the larger urbanised areas of the North such as South Yorkshire, West Yorkshire and Greater Manchester.

International Visitor Journeys

- The majority of international visitors travel to the North directly, having arrived at one of the North's airports. Those visiting the North for a holiday are least likely to travel directly, with around a third visiting another part of the UK first.
- Journeys to/from the North's airports are made using a variety of modes, with higher proportions of taxi and rail journeys, and lower proportions of car journeys, than the UK average. This is especially the case for airports which feature good public transport links.
- Manchester Airport is used by international visitors to all the North's regions, whereas the North's other major international airports are more regional in character.

Accessibility Analysis

- HS2 and Northern Powerhouse rail will bring significant journey time benefits to journeys between the North's core cities, London and the South East, and key international gateways.
- More remote parts of the North, which rely on connecting public transport services not currently planned to be upgraded as part of HS2 or NPR, will not see major improvements to journey times.
- Bus services outside the North's urban areas, especially in rural visitor economy hotspots, are sparse, making journeys by public transport difficult and inconvenient. Service coverage in rural and coastal areas is reduced during winter months, making public transport less dependable and attractive.

Primary Research Findings

6. Research with Residents, Visitors, and Transport Users

6.1. Introduction

Having established a baseline understanding of the profile, size and value of the North's visitor economy, and its interactions and dependencies on the North's transport networks, primary research was undertaken with UK residents, and visitor economy and transport industry stakeholders. The purpose of this research was to capture further qualitative insights into the North's visitor economy to help inform the sustainable growth of the sector and its recovery from the Covid-19 pandemic. The Evidence Base, outlined in previous chapters, directly informed the development of the primary research, highlighting areas of insufficient research which this study aims to fill. The primary research undertaken by this study also helps to develop an understanding of the impacts of Covid-19 on the leisure, tourism, events, and visitor sectors. Due to the disruption caused by the Covid-19 pandemic, there are few sources of data and research examining how the visitor economy has been impacted, particularly at a pan-Northern scale. The research presented in the subsequent chapters of this report therefore helps to fill this knowledge gap, identifying the aspirations, concerns and opinions of the public, alongside the views, experiences and needs of the industry at this time.

6.2. Methodology

A total of 9 focus groups with residents of the North and other parts of Great Britain were completed as part of this study, with 8-12 participants being recruited for each session. Participants were recruited and subsequently segmented into the relevant session based upon their demographic characteristics (whether they lived in the North of England or outside the North, and whether they lived in a city, town, or rural area). The recruitment strategy considered the social makeup of each area, ensuring a mix of ethnicities and ages were recruited which accurately represented the population characteristics of Northern cities, towns, rural areas, and non-Northern cities, towns and rural areas. This led to the recruitment of a greater proportion of Black and Minority Ethnic (BAME) participants for the non-Northern cities focus groups, and a higher proportion of older participants for the rural area focus groups, to more accurately reflect the characteristics of these areas. A number of participants suffering from mental ill health, additional mobility needs, and other disabilities were also recruited in order to reflect the specific needs of diverse groups within the research findings.

This recruitment strategy led to a total of 96 participants taking part in focus group activities. Each focus group was 2 hours in duration. All focus groups were undertaken virtually using Microsoft Teams during April 2021, therefore complying with Covid-secure guidance in place at the time, and to ensure the safety of our participants and research team.

6 Focus Groups with Northern Residents (total of 60 participants)	3 Focus Groups with non-Northern Residents (total of 36 participants)
• 2 x Northern Cities	• 1 x Cities outside the North
• 2 x Northern Towns	• 1x Towns outside the North
• 2 x Northern Villages	• 1 x Villages outside the North

Following the completion of the focus groups, notes from the sessions were finalised and compiled, and analysed using latent content analysis and open coding. This enabled the identification of emerging themes, which were further refined through additional analysis and narrative development to generate meaningful findings. Quotations are presented to provide direct access to the views and experiences of the participants who took part in this study. Where direct quotations have been made, relevant demographic information has been provided to contextualise the participant's perspective, while pseudonyms have been used throughout to ensure anonymity and the protection of privacy.

6.3. Findings

6.3.1. Which Emoji?

Each focus group began with an activity titled ‘Which Emoji?’, where participants were asked to select an emoji which summarised their sentiment towards visiting the North for a day trip, a weekend break, and a longer stay (4-7 nights+). Table 6-1 provides a summary of the responses.

It is interesting to note that more responses were provided by participants for the final question ‘what emoji would represent your emotion if staying in the North for 4-7 nights or more?’ (85 total responses) than for weekend trips (73 responses), or days trips (75 responses). This is likely due to this being the final activity, with participants feeling more at ease and confident to respond. However, we can also infer this increase in emojis represents an increased mix of feelings regarding visiting the North of England for longer stays, where one emoji isn’t sufficient to represent participants’ views. This was also validated in the qualitative feedback our team received by text message e.g. ‘mixed emotions!’ was sent through by one participant.

We can see from the results of this exercise that focus group participants have predominantly positive emotions when thinking about visiting the North for a day trip, a weekend break and a longer (4-7 nights+) stay. 33/75 responses for the day trip exercise chose a version of a smiley face to represent their emotion (44% of responses), with 23/73 choosing a version of a smiley face for the weekend stays emotion (32% of responses) and 20/85 choosing a smiley face emoji for their longer stay emotion (24% of responses). The emoji with heart eyes was the second most popular emoji for all lengths of stay, with 17% (day trips), 21% (weekend breaks) and 13% (longer stays) of all emojis respectively.

Although the majority of emojis represented positive emotions, a significant minority did represent negative emotions too, for each of the three trip categories. 19% of all emojis for the day trip activity can be classed as negative (with the majority being anxious/upset face emojis and unsure/thinking face emojis). With comments from participants on these themes including concern regarding reaching Northern destinations by public transport, and whether such long journeys, or journeys with changes or possible delays, would be worth making for a day trip. This was a particular theme from non-Northern residents. For weekend breaks, 15% of emojis can be said to represent negative emotions, with the majority being unsure/thinking emojis and a combination of emojis for poor weather. Concerns about cold weather and rain when visiting Northern England for a weekend leisure trips did not feature as a top concern in focus group discussions, so it is interesting to see poor weather feature as a factor impacting sentiment about visiting the North in this activity. For longer breaks, 23% of emojis can be said to represent negative emotions, with the majority being the unsure/thinking face emojis, and a collection of other more extreme emojis representing ‘no’ such as the warning sign or arms crossed person. Reasons for this could include participants, particularly those who lived in the North, being unsure there would be enough to do on a longer Northern holiday, and a preference for foreign breaks if given the choice.

Overall, the results of this activity tell us that there are a range of different positive emotions that dominate perceptions of visiting the North of England for leisure purposes, across all durations of trips. Variations of happiness, love, excitement, jubilation, and an association with rural leisure activities (such as mountains/scenery which appeared 5 times overall across the groups, climbing, walking and swimming), all featured strongly in the emoji choices participants made. There is, however, a trend for mixed emotions when participants thought about longer trips, reflected in comments that there may not be enough to do in certain Northern destinations for 4-7 nights+, and some uncertainty about choosing to spend a longer holiday in the North rather than a warmer destination. There is also particular anxiety from a minority of participants about visiting Northern destinations for day trips (10% of emojis for this length of stay were anxious faces with a further 9% of other kinds of negative emojis such as the sad face, cold face and thinking/unsure faces).

Table 6-1 - 'Which Emoji?' focus group activity results

Day trips		Weekend breaks		4-7 night+ stays	
Emoji	*No. of times chosen*	*Emoji*	*No. of times chosen*	*Emoji*	*No. of times chosen*
(smiley face – all versions)	33	(smiley face – all versions)	23	(smiley face – all versions)	20
(face with hearts – all versions)	13	(face with hearts – all versions)	15	(face with hearts – all versions)	11
(anxious/upset face -all versions)	7	(thinking/unsure face – all versions)	7	(thinking/unsure face – all versions)	10
(thinking/unsure face – all versions)	3	(party – all versions)	6	(face with sunglasses)	5
(face with sunglasses)	3	(face with sunglasses)	6	(clinking glasses/alcohol)	4
(a-ok gesture)	2	(clinking glasses/alcohol)	3	(cold face)	3
(hugging/waving with excitement)	2	(raised hands/whoop gesture)	2	(mountain/scenery)	3
(beach with umbrella)	1	(thumbs up)	2	(party – all versions)	2
(starstruck face)	1	(cold face)	1	(running)	2
(running)	1	(umbrella)	1	(thumbs up)	2
(sad face)	1	(snow)	1	(camping)	2
(upside down face)	1	(swimming)	1	(sleep)	2
(angel/halo face)	1	(tongue out savouring food)	1	(walking)	2
(sleep)	1	(starstruck face)	1	(cycling)	2
(mountain/scenery)	1	(mountain/scenery)	1	(hugging/waving with excitement)	2
(compass)	1	(warning sign)	1	(tongue out savouring food)	2
(cartwheel)	1	(climbing)	1	(surfing)	1
(cold face)	1			(yoga)	1
(clinking glasses/alcohol)	1			(climbing)	1
				(hot face)	1
				(one hundred points)	1
				(person gesturing no)	1
				(thumbs down)	1
				(wink face)	1
				(face with rolling eyes)	1
				(fire)	1
				(rowing)	1

6.3.2. Theme 1 – Wide range of reasons for/attractions when visiting the North

Most participants highlighted the variety in the North as a key selling point for holidaying there, noting various cities and towns, coastal areas, National Parks and Areas of Outstanding Natural Beauty (AONBs), as well as more rural villages, all as key attractors. They highlighted how this variety provides them with the ability to move between different types of area across consecutive days (e.g. moors on day 1 and seaside on day 2). Participants also mentioned a variety of areas that are great for activities with children, such as Blackpool and other coastal areas, or the Lake District with its water sports and outdoor offerings.

Having a variety of places to eat and drink was also referred to by the participants and improved their experience of visits in the North, while the North's shopping and retail offer was highlighted by participants as a potential draw, and could also act as an additional selling point if not the main aim of the visit.

Sports, such as football, rugby, and cricket, were also identified as a key draw to the North of England amongst a number of participants. These attractions could be combined with a visit to friends or family, time spent exploring the North's nightlife, or a visit to a beauty spot. The North was also viewed as being accommodating for trips with friends, family, and other larger groups.

History, art, architecture and music are also mentioned as draws, and for fans of culture can be the main draw to the North; however often these attractions are thought of alongside others such as food, drink and nature, which all add to a holistic offering.

> "We are members of the National Trust so have visited quite a few places, also the countryside in Northumberland and the beaches are absolutely wonderful – for example Tynemouth. There are a lot of places to visit, if you want to go somewhere for longer like a city such as Leeds which is great with different markets, shopping opportunities and some of the architecture, the old buildings are fantastic. There is something for everybody."
>
> *– Yiannis, 50, Cheshire, Chester [Northern cities]*

Figure 6-1 demonstrates the most popular attractions focus group participants mentioned when discussing reasons for visiting the North of England. The Lake District is the most popular destination mentioned in the focus groups overall, with several large Northern cities also proving very popular attractions for participants. A collection of smaller words are also shown, many of which represent the National Trust properties and other heritage locations across the North, which altogether proved very popular with participants.

Figure 6-1 - Most popular destinations in the North among study participants

Overall, the responses demonstrate the existence of a significant variety of attractions which bring visitors to the North of England, but that more could done to promote these to a wider audience both within the North and beyond the region. This is exhibited by the dominance of the Lake District, Manchester, Newcastle, and York on the wordcloud, while other cities of importance, historic sites, and beauty spots are less well recognised.

6.3.3. Theme 2 – Length of stay preferences for Northern and non-Northern residents

The majority of participants that were residents of the North shared that they preferred visits in the North of England to be day visits, or long weekends, rather than a lengthier trip. The main reason for this was that participants wanted to travel further afield for longer trips (usually overseas, but other parts of the UK too such as Wales, Scotland, or Devon). Some participants also felt uncertain that there would be enough activities and attractions to see for a longer trip in the North. It was also clear that participants feel that less commitment and planning is required for day trips or longer weekends compared to making itineraries for a longer trip.

> "What on earth could I do in the North for a week of holiday?!"
>
> *– Amy, 29, West Yorkshire, Bradford [Northern villages/rural areas (Visitor Economy Hotspots)]*

For non-Northern residents, the North is often seen as too far to come for a day trip, with a number of participants highlighting they would rather visit for long weekends or longer trips. Cost, distance and time were all factors against participants living outside of the North so a longer trip would potentially make it more worth their while, especially for those with children. A number of respondents mentioned a 2-hour journey being the maximum they would spend for a one-way commute when making a day trip. Interestingly, non-northern residents didn't seem to identify an issue with lack of activities in the North for a longer trip (unlike Northern residents), with many participants highlighting there would be plenty to do.

There was an interest from non-Northern residents to explore the North, which was generally less well known to the non-Northern residents, and for more information to be made available regarding locations and attractions to visit for longer stays.

Day trips	**Weekend stays**
Participants mainly spoke fondly of day trips, unless living a significant distance from the North. They highlighted the variety of attractions available within a few hours, including coastal areas, National Parks and AONB's, as well as cities and towns. Particular mention was given to the lack of commitment required for day trips and the ability to just set off on the day, or book in the days before. Usually 2 hours was listed as the maximum travel time for a day trip (one way).	These were discussed as exciting and joyful trips during the 'which emoji' exercise, and in general Northern participants viewed visiting the North for a weekend break as positive. Weekend stays avoided the stress and anxieties non-Northern visitors identified with attempting day trips, and also avoided the potential boredom and missing out on sunshine for a main family holiday that Northern residents identified as a drawback for longer stays. Rural locations such as the Lake District and Peak District were discussed as some of the main destinations Northern and non-Northern residents would like to visit on weekend breaks, though some Northern residents were also very keen on repeat trips to familiar seaside destinations such as Crosby beach (Southport) and Whitby.

6.3.4. Theme 3 – Timetabling, ticketing and integration issues when planning a Northern trip

A number of participants raised the issue of public transport not providing adequate services on weekends or evenings, making trips during these periods especially difficult. Participants highlighted the infrequency of service at those times, as well as in rural areas more broadly. It was also noted that timetabling for buses can be confusing and overcomplicated, with varying timetables for different days, bank holidays, term time and non-term time all adding to the confusion.

> "All the companies need to work together. Where I live there are 4 bus companies, I need a ticket for that one, and another one and another one maybe just for a 4-mile journey. Which would cost me loads.".
>
> *– Hamed, 25, West Yorkshire, Huddersfield [Northern towns]*
>
> "If you want to take a train, you may need to get a bus…and now you have to think about the timing of both of them, connection anxiety".
>
> *- Helene, 42, Hertfordshire, Watford [Non-Northern towns]*

Participants also noted ticketing issues, citing the need to purchase separate tickets for different operators or modes as a key issue. Participants also noted frustrations that flexible public transport tickets are charged at a premium, whereas flexibility is guaranteed when choosing to drive. Some participants mentioned a card on which multiple journeys could be made across transport modes (a multi-modal travel card) would be a good initiative - allowing the bulk purchasing of journeys at a reduced price, daily price caps, and easy top ups, to increase flexibility, and provide a move away from having to make large purchasing decisions upfront as with traditional season tickets and other products.

The need to take multiple trains and/or buses for some journeys was also brought up, with participants noting they often have to buy multiple tickets which increases the total price from door to door. Respondents highlighted that daysaver tickets are sometimes available, but are again expensive and don't always offer good flexibility. Changing onto another form of transport also seems to raise a lot of anxiety around reliability, with many participants seeming to avoid journeys with changes altogether.

"The multilayers of transport use valuable time and it adds to the time and stress of getting home. Your vehicle is ready and has diesel in it."

– Samira, 48, West Lothian, Livingston [Non-Northern towns]

"Disjointed websites are a big issue. To know where you actually book tickets can be difficult."

– Jasdeep, 40, West Midlands, Sutton Coldfield [Non-Northern towns]

Integration was also highlighted by participants from an information perspective; it was noted there are websites and apps from lots of different companies, making it difficult to find the information they need. Integration was also discussed by some participants from the perspective of integration between transport and attractions; it was felt this could be considered more when developing transport schemes, and by attractions themselves, who could provide information on nearby interchanges, stops or stations when booking a ticket.

Despite these challenges, participants who had used public transport in the North were generally positive about services, particularly those running through scenic areas. While thorough planning may be required due to low service frequencies, the ability to relax, not worry about parking, and watch the passing scenery, were all identified as major assets.

"Parking prices in the Lake District are very high so we always take the bus. My experience of buses in the Lake District has been quite good. It is not very frequent but if you have the bus timetable, you are fine."

– Kavita, 34, North Yorkshire, Harrogate [Northern towns]

"As a passenger you can see the scenery, especially on PT you have the most scenic bus routes. Can concentrate on the landscape and peace and tranquillity."

– Dennis, 74, North Yorkshire, Ryedale [Northern villages/rural areas (Visitor Economy Hotspots)]

6.3.5. Theme 4 – Cost / Value for money of Northern travel

Cost was highlighted as a recurring issue by focus group participants, with some participants identifying it as the most significant barrier preventing them from visiting the North. Many of these comments were made in relation to the cost of public transport when travelling as a group. This contrasted with the perceived lower costs of travelling by car, which reduce as more passengers share the trip. The cost of public transport, especially for families or larger groups, was found to be a major barrier for a significant minority of participants, who talked about the 'extortionate' prices for rail fares between the North and the South in particular, which compared unfavourably in their experience to visiting further afield destinations such as Scotland or Spain.

At the present time, visits to the North are considered poor value for money by many Northern and non-Northern residents, and participants talked about wanting to see public transport being made more affordable to working families. The increasing cost of public transport tickets closer to the date of departure worried a number of participants, while the price of flexible tickets generally made public transport uncompetitive with other modes. Many respondents stated they enjoyed train journeys, and wanted to take the train more often, but found the cost prohibitive at present. This was particularly an issue for those with families, who would need to buy a ticket for each person travelling. Consequently, participants felt that public transport could not rival the private car (where the cost stays uniform, despite travelling at short notice or the same day, for example). This is particularly important when thinking about last minute day trips, which may be increasingly popular in the post-Covid environment, especially while uncertainty surrounding restrictions remains.

> "We normally drive to Newcastle, Manchester, Liverpool for day trips. Transport is an issue, as it's cheaper to drive as a couple rather than buying a train ticket. Especially if you only thought about the trip recently. It's not that eco-friendly. I would like to use the train more often, but the price puts me off."
>
> *– Claire, 27, Nottinghamshire, Nottingham [Non-Northern cities]*

In some instances, cost can be seen to prohibit participants from staying overnight, and they would substitute an overnight trip for a day trip to try and save costs. When thinking about the visitor economy, this is an important consideration as overnight stays typically generate additional visitor spend and income. At the same time, the visitor economy should remain accessible to all, including those who have lower disposable incomes.

Some participants were concerned that the cost of parking has increased over recent times. Specifically, it presents an issue when 'hopping' from place to place, but only wanting to stop for a short duration in each location. However, some participants noted that the price of parking had caused them to switch mode, for example to the bus, and they'd had a good experience of the bus after using it. Therefore, positive impacts can be seen from parking price increases too.

Participants seemed split when discussing the cost of accommodation, with some participants mentioning accommodation in the North being of "similar prices to London" in a lot of places. Some participants also mentioned apparent price inflation with the increase in Staycations due to the Covid pandemic. Some even alluded to this potentially putting them off visiting the North in the future.

However, a number of participants did also note that accommodation and Northern trips were more affordable than those in the South, with a number of respondents particularly mentioning food and drink being cheaper in the North.

6.3.6. Theme 5 – Desire for more information and marketing of the North

Most participants thought there was limited information about the variety of attractions across the North of England, the transport options available, and some of the tourist offerings (e.g. bundles/tourist tickets). Some participants even alluded to the lack of transport information increasing emergency/mountain rescue callouts in rural areas.

> "Finding up to date and accurate information isn't as good as it should be, especially in deep rural areas where you really do need confidence in public transport."
>
> *– Dennis, 74, North Yorkshire, Ryedale [Northern villages/rural areas (Visitor Economy Hotspots)]*
>
> "Greater publicity for particular attractions is the sort of thing which captures people. There are well known attractions but an actual push, like City of Culture type events that make you think 'ah yes!'".
>
> *– Edmond, 67, Devon, Brixham [Non-Northern Towns]*
>
> "There are a lot of adverts from Visit Wales with promotional videos of regions etc. But I don't see anything like this from the North, just a lot about Wales"
>
> *– Yiannis, 50, Cheshire, Chester [Northern cities]*

The lack of readily available information was primarily seen in a negative light, as it requires visitors to do more research on their trips and generates feelings that they might miss out on some of the big attractions. Where information is available, participants felt it was fragmented, causing them to have to navigate a number of resources to get the information they need. Participants noted that each area tends to market only their patch, meaning information on attractions in surrounding areas can be easily missed. Some participants also identified the North does not have a consistent brand to advertise its visitor offer, identifying the strength of brands such as Visit Wales over many of the North's existing tourism marketing ventures.

However, some participants highlighted the joy of "hidden gems" (usually sites of natural beauty) which can be found across the North. These were termed "hidden gems" by participants as information is often lacking or not widespread, making them largely unknown and less visited as a result. This led to some participants expressing concerns that these "hidden gems" could become crowded if they're promoted more widely.

A number of comments were made about route signage, with some participants perceiving there to be better signage in the South, particularly 'brown' signage which identifies the location of tourist attractions and facilities. Good quality, accurate signage was important to visitors, providing them with confidence in wayfinding and navigation, especially once at their destination.

6.3.7. Theme 6 – Reliance on private car for trips to the North / public transport issues

Across the board amongst focus group participants, there was a reliance on the private car for trips to the North. The only situations where this is not the case seems to be for city breaks or coach tours. For the majority of both Northern and non-Northern residents, the private car was identified as by far the most convenient and widely used transport mode when taking a trip to the North. This was especially the case for weekend breaks and longer stays. This reliance on the private car was also most prevalent among families, especially those with children, and those with mobility issues with someone in their household who could drive them to leisure destinations. Reasons for this included the ease of transporting loads such as luggage and bikes, as well as the ease when traveling with children, and the flexibility the car provides in terms of multi-destination visits. For example, being able to visit multiple villages in the Peak District or multiple lakes in the Lake District were mentioned several times by participants to demonstrate how no other option but a private car would be suitable.

"Everyone wants to travel by car. It's about how you get those clear transport links to the rural areas. Everyone wants to go walking or camping but want to go in their car. It's great everyone wants to go outside, it's about a way of working out getting everyone there. Maybe park and rides. We're finding families are moving up to spend time together but could be arriving in 4 different cars for a beauty spot. There needs to be a move away from using cars for everything."

- Joshua, 37, Cumbria, Copeland [Northern villages/rural areas (Visitor Economy Hotspots)]

"We would normally drive to a holiday/trip in the North, we would always drive, but anywhere in the South we get the train. Its only 1hr 40 into Euston and we have a family rail card, and we don't have to bother with a slower journey and also the issue with driving in London. The trains are not as convenient or fast in the North – often packed and very slow. If the service was as good for trains going South (fast, less changes) I would be open to using the trains in the North."

– Jill, 43, Cheshire East, Bollington [Northern villages/rural areas (Visitor Economy Hotspots)]

This reliance on private car is also linked to negative perceptions, and real-world experiences, of using public transport to travel to and within the North. Anxieties around the reliability of services – that services may be cancelled at the last minute, or may be subject to delays – put many participants off making visits to the North via public transport. Participants also identified a lack of through services between key places in the North, and while sometimes open to changing trains (generally when travelling alone and without luggage), the majority of participants preferred direct services where possible, and would generally travel directly by car if a public transport journey would involve changes. Participants also identified a lack of consistency in the quality and reliability of the North's public transport services – this was especially the case when comparing north-south and east-west services.

6.3.8. Theme 7 – Travelling to the North during and post Covid-19

A number of participants are nervous about returning to public transport post-pandemic, particularly in the short term. They mentioned the idea of mask-wearing for long periods of time being uncomfortable and a negative experience, as well as the worry that other passengers wouldn't socially distance or wear masks. Participants did note that when everyone is vaccinated, they would feel safer going back to using public transport. With participants now used to feeling a greater sense of safety and hygiene in their cars, alongside perceptions of greater flexibility, it is possible that the return to public transport might be slow and difficult for some groups without interventions, incentives, and nudges.

However, there was a split between participants who were concerned about returning to public transport following the opening up of national restrictions in April and May 2021 and those who did feel comfortable to make leisure journeys by public transport and were keen to revert back to pre-pandemic behavioural patterns. This split was approximately 70-30 between those who were more cautious to those who were happy and ready to get back on public transport.

"My friends have booked a staycation in May or June and do not plan on going abroad. I would like to visit places in the North that I have not yet discovered such as the Lake District. A lot of my friends have children, so we are staying close to their hometowns."

– Zenia, 31, West Yorkshire, Kirklees [Northern towns]

The majority of participants also noted preference to holiday in rural or coastal areas rather than making trips to cities due to the threat of Covid-19, citing the greater likelihood of being able to socially distance in a rural environment as opposed to an urban one.

There was also an increased willingness to stay local when it comes to leisure trips due to a 'Covid effect': participants talked about enjoying being outside more and visiting more local attractions as something to do that was within 'stay local' rules. This likelihood for Northern residents in particular to increase their leisure visits within the North seems very likely to remain for some time according to sentiment and plans expressed from our focus groups.

Across the focus groups, there was an increased likelihood post-pandemic to utilise public transport when visiting urban destinations for leisure rather than when visiting rural destinations. This finding emerged from textual analysis of verbatim comments and was not posed to focus group participants as one of the workshop questions, however it was interesting to find quotes from 11 participants who mentioned enjoying using public transport to access Northern cities when visiting for leisure. The quality of services such as connections and frequency of trains at the large Northern stations were discussed as particularly positive. This positivity was in stark contrast to the difficulties participants talked about when travelling to rural areas of the North, which are viewed as poorly connected via public transport and best reached by the private car.

Due to the reluctance exhibited by many participants to return to public transport and urban areas post-pandemic, it may be necessary for TfN, destination management organisations, and transport operators to collectively consider interventions which could mitigate these findings. This could include promoting public transport travel to large Northern cities and medium sized towns, with the aim of encouraging more visitors to return post-pandemic, and to help to alleviate some of the cost barriers faced by potential visitors.

6.3.9. Theme 8 – Accessibility and inclusion for Northern transport

For a sub-set of focus group participants, conditions which have limited their physical mobility were the most significant factor when choosing whether or not to visit destinations in the North for leisure, and had a very significant impact on which transport mode they chose to make their visit. For all of those Northern and non-Northern residents who self-identified as having a condition which limited their mobility (10 in total), all discussed how using public transport could be very difficult for them, especially certain modes which they would always avoid rather than deal with the challenges they would face trying to access them.

> "I'm actually registered disabled and the biggest barrier for me would be checking disabled access prior to visiting any of these places, I would really have to look into it."
>
> *– Kim, 69, Hampshire, Hedge End [Non-Northern towns]*

One participant from this group talked about how she would not use the train if she were travelling alone, and felt uncomfortable and anxious about getting to her seat and alighting. All of these participants talked about the need for more accessible public transport services to encourage them to visit the North or to visit new destinations, and there is clearly a demand for leisure trips to the North from those with mobility issues, which could be tapped if services were made more accessible. Ideas mentioned included having easy access to electric mobility scooters at flatter Northern destinations such as coastal resorts, and having additional support by members of staff from transport operators and/or tourist boards to help assist those with additional needs, especially if they were travelling with children and/or luggage, to reach additional transport modes once they reach a station, and to enable 'final mile' journeys to be stress free and manageable. Being able to consistently access this assistance is key to breaking down the barriers these groups face, as they would know they had help in advance of setting off.

> "I have mobility issues, so haven't been able to work so have a low income from benefits. Cost is definitely a factor. As a single mum managing them and myself is a problem. Having a partner or carer with me would allow me to do this, being by myself is a barrier. Controlled prescriptions make it difficult, will I have enough? Also, I won't be able to do much when I get there. There's a lack of accessible activities."
>
> *- Tamara, 32, Somerset, Bath [Non-Northern cities]*

Many participants we spoke to with physical disabilities also faced other intersectional disadvantages such as low incomes and metal health issues, further limiting their independence. Income deprivation was a particular barrier due to the high cost of travel by public transport to and within the region. When combined with other barriers, visiting the North became off limits for many. Participants in the study would welcome interventions to help make travel to the North easier and more affordable, therefore enabling them to enjoy the diverse range of attractions the North has to offer.

6.3.10. Theme 9 – Sustainable travel, active travel and micro-mobility during leisure trips

Some participants were clearly driven by their values of environmentalism and their willingness to make sustainable travel choices rather than be driven purely by cost/convenience. This appears to be a more significant trend in younger generations. However, a high number of participants seemed aware of the environmental impacts of their transport choices, but are ultimately unwilling to change mode from the comfort/flexibility of their private car.

"I'm very environmentally conscious. Seeing the pollution decrease during lockdown makes me want to reconsider whether I need a car for this trip. It's easy for me to get public transport."

– Yasmin, 18, Greater Manchester, Bury [Northern towns]

"Transport is the main barrier for me. I live in a small village in the Peak District. I prefer to travel by public transport as it is more environmentally friendly, but the timetable is limited meaning that it would take a long time to get somewhere. If I want to visit somewhere rural, I do have a car but I am aware of the congestion issues that occur when people drive to visit rural areas and am mindful of the issues that causes."

- Rachel, 26, Derbyshire, Derbyshire Dales [Northern villages/rural areas (Visitor Economy Hotspots)]

"I definitely would walk or cycle when I would get there [to my destination], I have started doing more walking so I would love to walk or cycle, or even use e-scooters."

- Tom, 42, West Midlands, Coventry [Non-Northern cities]

There were also frustrations for many participants who liked to take cycling breaks that there is currently not enough provision for bike racks/cycle carriages on trains, and they highlighted the need for more safe and secure bike storage facilities at stations and transport hubs.

There was clear interest in using micro-mobility modes at Northern destinations from a significant proportion of focus group participants. Over 40% of participants voted in our poll at the end of the focus groups that easily accessible e-scooters or e-bikes at Northern destinations would encourage them to visit destinations in the North. There is therefore an opportunity to increase use of micro-mobility modes among visitors by providing these, particularly in urban Northern destinations.

6.3.11. Theme 10 – Tourist-Locals Relationship at Northern beauty spots

During the focus groups there were several examples of a tension between visitors and local residents in popular Northern destinations. Comments were made by residents of villages in the North's National Parks and other beauty spots that they felt compelled to stay in their homes and gardens during the summer months, as their village became overcrowded with visitors. However, comments were also made that Northern villages and beauty spots need the income from visitors, although there are significant challenges regarding overcrowding in the most well-known rural villages, particularly an over-demand for car park spaces, which can result in an unpleasant

"There is a slight irony in the fact people have to park so close to do a walk, it's bizarre they can't park further when doing a 6-mile walk."

- Julie, 47, East Yorkshire, South Cave [Northern villages/rural areas (Visitor Economy Hotspots)]

"It [tourism] has impacted my life, the village becomes so busy that at weekends I tend to stay at my house. Also, we have a lot of wildfires near the village which is a large cause of concern."

- Rachel, 26, Derbyshire, Derbyshire Dales [Northern villages/rural areas (Visitor Economy Hotspots)]

"People coming here would like to visit country pubs which have been shut. So, we have had lots of people coming here walking. When its rainy, this causes issues with local farmers' crops who allow access through fields as they get churned up by people walking through it."

– Ian, 55, South Yorkshire, Ridgeway [Northern villages/rural areas (Visitor Economy Hotspots)]

environment for locals and visitors alike, for example if visitor car parks overflow and cars start parking on local streets.

There were comments calling for more action to spread out visitor numbers across the North, to relieve pressure on the 'honey pot' destinations, and provide more marketing and/or incentives for visitors to visit less well known destinations, in order for the North to better manage demand from the visitor economy. The need for improved public transport links and services such as park and ride facilities at or near Northern visitor hotspots was also identified as a potential solution to the issue of overcrowding during peak holiday seasons, as this would reduce the pressure on local infrastructure. Park and ride is a potential solution where additional public transport services cannot be easily provided, and where demand has seasonal peaks and troughs, requiring additional capacity to be provided for crucial high season periods.

6.4. Conclusions

The conclusions below are themes which most strongly emerged from our primary research with transport users and which also link back to our study objectives outlined in section 1.1.

Sentiment towards visiting the North

- Residents of both the North of England, and other regions, felt positive about visiting the North of England for a leisure trip.
- Generally, the most positive sentiment was felt towards a day trip to the North, with participants having mixed emotions towards a longer break in the North; participants generally wanted to travel further afield for longer trips.
- The most popular places to visit in the North included cities such as Manchester and York, and rural areas such as the Lake District and Northumberland. Some participants also identified the importance of "hidden gems", undiscovered parts of the North, which brought them great joy and pleasure.

Barriers to visiting the North

- For many participants, cost was a significant barrier, particularly if using public transport.
- Transport services to and within the North were considered poor quality, fragmented, and unreliable by many participants; consequently, the car was many participants' favoured mode of transport.
- The North was also perceived as providing poor value for money, especially in comparison to more distant destinations, both in the UK and abroad.
- A lack of information on the North and what it has to offer prevented residents from exploring the region more. This related both to the planning stage of trips, and also while in the North.
- In comparison to other regions and nations, the North was perceived to lack well recognised and consistent destination marketing, with information on the region being found across fragmented sites and apps.

Impacts of the Covid-19 pandemic

- The majority of participants noted a preference to holiday in rural or coastal areas rather than making trips to cities due to the threat of Covid-19, citing the greater likelihood of being able to socially distance.
- A 70/30 split was also observed amongst participants, between those who were more cautious, to those who were happy and ready to get back on public transport.

7. Stakeholder Engagement

7.1. Introduction and Methodology

Running in parallel to the focus groups with residents, a stakeholder engagement exercise was undertaken to capture the views of key visitor economy stakeholders from across the North of England. Stakeholders from the North's destination management organisations, leisure and tourism industries, local authorities and local enterprise partnerships, and transport operators, were identified by the Project Team through discussion with TfN and the project Steering Group. Following confirmation of a prioritised stakeholder list, contacts within each organisation were identified, and emails sent providing background information on the study, and an invitation to attend a stakeholder workshop. Representatives of the following organisations participated in the stakeholder engagement phase of this study.

Stakeholder Group	Organisation
National Parks, Destination Management Organisations, and Local Enterprise Partnerships	Cumbria Tourism
	Liverpool City Region Growth Hub
	Make It York
	Marketing Cheshire
	Marketing Lancashire
	Marketing Liverpool
	Marketing Peak District and Derbyshire
	Visit Britain
	Visit County Durham
Representative Organisations	British Cycling
	Football Association
	Meetings Industry Association
	Tourism Alliance
Transport Authorities and Operators	Avanti West Coast
	Confederation of Passenger Transport
	East Midlands Railway
	Leeds Bradford Airport
	Liverpool John Lennon Airport
	LNER
	Manchester Airport
	Newcastle Airport
	Northern
	Rail Delivery Group
	Stagecoach Bus
	Transdev
	TransPennine Express
	Transport for the North
	Transport North East

Alongside engagement with stakeholders, the project Steering Group continued to make an important contribution to the study, with representatives of some Steering Group organisations also participating in the stakeholder workshops.

Organisations represented on project Steering Group

Blackpool Council	Network Rail
City of York Council	NewcastleGateshead Initiative
Cumbria County Council	Northumberland National Park Authority
Department for Transport	North York Moors National Park Authority
Highways England	North Yorkshire County Council
Lake District National Park Authority	Peak District National Park Authority
Liverpool City Region Combined Authority	Yorkshire Dales National Park Authority
Marketing Manchester	York & North Yorkshire LEP

A total of 4 workshops were held during April and May 2021 with a cross-section of stakeholders attending each workshop to ensure healthy discussion and debate between the numerous sectors involved in the North's visitor economy. Workshops involved a range of co-creation activities to understand how transport in the North could be improved, the key opportunities and barriers facing the North's visitor economy, and the potential role of different stakeholders in securing a utopian vision for visitor transport in the North.

In addition, 6 individual consultations were held with representatives of organisations who were unable to attend one of the scheduled workshops. This ensured as many organisations as possible were able to share their views and shape the research findings. Each individual consultation followed the same structure as the focus groups to ensure consistency of data collection and approach.

Following the completion of the stakeholder engagement, notes from the sessions were finalised and compiled, and analysed using latent content analysis and open coding. This enabled the identification of emerging themes, which were further refined through additional analysis and narrative development to generate meaningful findings. Direct quotes are presented with permission to provide direct access to the views and experiences of the participants who took part in this study. The wishes of each participant were respected; therefore, some quotes have been anonymised, while others have been excluded or amended.

7.2. Findings

7.2.1. Theme 1 – Northern charm

During the stakeholder workshops there were a number of positive comments on the beauty of the North, alongside how friendly and hospitable the people are, including those who work in transport. Participants also expressed how the North has a strong variety of activities to offer visitors, and therefore is well placed to attract visitors from other regions. Positive phrases used to describe the North included "vibrant", "beautiful", "natural", and "landscapes".

There was a consensus across the stakeholder groups on the friendly and welcoming nature of Northern transport workers. This aspect was seen to give visitors a different feel to public transport, having a 'community experience' where travelling via public transport can be thought of as a meet and greet or communal experience. Public transport workers in the North were also described as a 'positive asset for attracting visitors' due to their friendliness, alongside the amazing views that can be seen while travelling on public transport in the North .

"People who provide transport in the North I've always found very friendly and good ambassadors, they're a positive asset for attracting visitors" … "In the North we have a wide variety, and it's an opportunity to spread the burden so that attractions aren't overwhelmed by visitors. The challenge is joining it all up, we're not good at integrating transport."

– John Bourn, Transport North East

"We have an amazing network of public rights of way and footpaths, and an emerging network of cycleways. We also have a great set of regional gateways – we can leverage these as part of the levelling up agenda to aid journeys."

– Nicola Said, Marketing Cheshire

"The north is the place where people from the crowded south east want to go. It has an incredible visitor economy, people come for longer holidays. They want to escape to the open spaces, vibrant cities."

– Nick Chamberlain, British Cycling

For TfN, the strength of the North's visitor offer, alongside its recognition amongst stakeholders, could provide an opportunity to use this as a marketing angle. The friendly and welcoming experience from the transport staff alongside the beautiful views that can be seen from train and bus windows can be marketed to attract visitors to use public transport when travelling to and within the North.

7.2.2. Theme 2 – Funding

Stakeholders expressed concerns that funding cuts were disproportionately affecting visitor economy hotspots across the North. In order to attract visitors to use public transport as part of their visit, stakeholders felt a dense and reliable network of services and stops was required, something which many rural areas in the North of England do not currently provide.

"Multi-modal integration – having that network there. The network in Cumbria is very sparse in some areas, especially since funding was cut. We are doing a lot of work to encourage people to travel sustainably, but this is only feasible in some areas"

– Gemma Proctor, Cumbria Tourism

Where funding remained available, stakeholders felt it was too time limited, and therefore did not enable them to establish services on a commercial footing prior to the end of the funded period. This issue applied across the spectrum of sustainable transport initiatives, such as integrated marketing and ticketing between attractions and public transport, and was regarded as a significant barrier to developing dependable alternatives by stakeholders.

"we did this [a booklet outlining activities, visitor attractions, and bus times] as part of the GoLakes and it was very popular, and we were asked to update it once the funding had run out. It generated a 15% modal shift. It was hard to keep it sustainable with advertising, but there was definitely the public demand"

– Gemma Proctor, Cumbria Tourism

"Incredible countryside, Lancashire moorlands north York moors, Northumberland but unfortunately because of funding constraints and cutbacks there is very limited transport accessibility to it"

– John Bourn, Transport North East

From this it can be said there may be a need to review transport funding in the North, especially in rural and remote places of interest where visitors are more likely to travel by car. Additionally, it may be worth having more investment in initiatives that combine transport and attraction sites to encourage visitors to use public transport to visit the North.

7.2.3. Theme 3 – Active Travel and Micromobility

Participants across the workshops highlighted their opinions on micro-mobility and active travel modes. While micro-mobility and active travel methods were seen as a positive aspect and opportunity in the North, there are some constraints that might hinder their successful roll out and uptake. This includes a lack of traffic-free routes in some parts of the North, and poor levels of accessibility for those with disabilities or non-standard bikes. Stakeholders commented on the current facilities of the North, describing amazing networks of public pathways for both walking and cycling. In terms of travelling to the North, especially with cycling, there may be opportunities to take advantage of cycle hire schemes at sites where there is a high volume of visitors. However, it was mentioned across the workshops that visitors are more inclined to bring their own bikes if they want to take advantage of cycle routes or pathways, more so if they have expensive or specialist bikes. Stakeholders also felt cycle hire schemes would need to provide a dense network of hire locations in order for any initiatives to be successful.

"We have previously trialled e-bikes, however we were a bit ahead of the curve here, and I think if we did this again we would have much better uptake. We also don't have the wider infrastructure e.g. to provide one way hires – this is easier in urban areas"

– Gemma Proctor, Cumbria Tourism

"Walking and cycling in the north of England is superb, especially up here in Northumberland. We do have our challenges though in that there are few traffic-free routes that connect town with more rural areas, and cyclists feel unsafe riding on busy roads. We need investment in transforming old railway line tracks for example into safe walking and cycling routes that connect town and country more directly"

– Duncan Wise, Northumbria National Park Authority

While there is an option for visitors to use public transport and put their bikes on the train, stakeholders identified the introduction of new rolling stock throughout the region had led to a reduction in cycle storage space on some popular services, which may deter visitors from using trains and encourage use of a private vehicle instead. Stakeholders reported that newer rolling stock had been designed to maximise seating capacity, with little or no dedicated space available for the carriage of bikes. On some rolling stock, bikes must be lifted vertically into position, excluding some potential users. A more general conflict was identified by stakeholders between current DfT policy for bikes to be available at each end of the rail journey, and preference amongst customers to take their bike with them onboard trains. Where cycle hire schemes had been trialled, they had generally not been popular among customers, with stakeholders concluding that customers prefer to bring their own bike with them, instead of hiring one at a destination.

"With the new and refurbished rolling stock, they have much smaller spaces for bike storage. Rather than a dedicated space, it might coexist with a flip up seat (Pushchair/wheelchair space), making it difficult to get bikes in"

– Nick Chamberlain, British Cycling

Despite this, there are still opportunities to take advantage of the North's offering for active travel and micro-mobility. One suggestion during the workshops was the idea of onward travel hubs offering a range of first and last mile travel options, especially cycle and scooter hire.

"People don't travel to stations, they go beyond them to a specific destination, so we have to focus on integration with first and last mile modes of transport, such as cycles, scooters, car hire. This can't be segmented as customers may want different modes at different times, meaning there is a real opportunity for onward travel hubs"

– Charlie French, Avanti West Coast

"There is an opportunity to look at public transport in a different way. Our cities don't have the same legibility for pedestrianisation and cycling like other European cities. Micromobility is therefore a good offer"

– Alex Roy, Manchester Airport

Walking and cycling can be seen as one of the selling points of the North due to the vast amount of space and the wide range of walking and cycling routes available to visitors for both leisure and travel purposes. There is great opportunity to take advantage of these assets and encourage sustainable active travel across the North for visitors. Despite the fact that some visitors may be more inclined to bring their own bikes, investing in cycle hire schemes may be beneficial in terms of providing first and last mile options for visitors once they have arrived via public transport rather than using a private vehicle for the whole journey. The idea of onward travel hubs in places of interest will encourage the use of cycle hire schemes but it is important to consider the locations of these travel hubs to ensure substantial uptake from visitors. The facilities offered at onward travel hubs will also need to be tailored to the characteristics of the surrounding area, and the most appropriate forms of mobility.

7.2.4. Theme 4 – Connectivity

Stakeholders mentioned that in terms of connectivity, travelling from the South of the UK is relatively simple with many trains going from London to different areas of the North and some within as little as 2 hours. Although, there was general consensus that travel across the North, especially east-west connectivity is poor and proves to be challenging.

"To anybody who has ever tried to get across the North of England, the lack of spending on infrastructure in the North compared to what you see in the south is obvious to anybody, bottlenecks where there shouldn't be and lack of routes where there should be"

– Robert Nisbet, Rail Delivery Group

"Accessibility to rural locations can be challenging, especially East-West links. Our SWOT analysis for the emerging Lancashire Tourism Growth Strategy identified weak public transport in countryside localities, combined with outdated rural road infrastructure as a weakness and challenge across the county"

– Justina Ma, Marketing Lancashire

There was a strong opinion across stakeholders that connectivity within the North should be improved, especially since visitors are likely to move around and not stay in one place when visiting the North meaning they will be more likely to take a private vehicle to travel as public transport links are poor. As well as this, key tourist sites and areas of natural beauty, especially those in rural areas, generally have poor transport infrastructure and low public transport service frequency. The Bentham line, which serves the Forest of Bowland AONB, was identified as an under-used asset, which could be further developed to encourage visitors to the area to travel by public transport. From the perspective of organisations involved in the planning of transport services, frustration was expressed that many tourist providers tend to focus on private transportation as they assume that visitors will be travelling by car. Despite this, a number of examples of good practice were identified by stakeholders, such as open top bus services in Cumbria, and the Yorkshire Coastliner bus service. These services have been subject to intensive marketing by their respective operators and combine scenic routes with good quality buses and high levels of customer service.

Stakeholders identified a need to improve connectivity across the North, in particular east-west links which are currently considered to be inferior to north-south connections. This is especially prominent in rural and coastal locations where poor transport options, infrastructure and frequency mean that they are hard to reach, especially from other places in the North. While programmes such as Northern Powerhouse Rail will improve links between the North's core cities, rural and coastal areas will not see equivalent transformational benefits. Attention therefore needs to be paid to transport needs of visitors travelling to more rural and coastal areas to ensure services are high quality, frequent, and provide competitive journey times.

Limitations with the current public transport offering across the Northern region were also highlighted during the workshops. Unreliable, infrequent and outdated trains or buses can deter visitors from using public transport in the North, especially if they have had one bad experience, this can lead visitors to use a private vehicle every time they want to visit. This, as well as operational hours which do not coincide with other transport providers such as train times and bus times or public transport times and airport busy periods will continue to discourage visitors to use public transport.

> *"Slow and outdated trains, my heart sinks when I get the timing wrong and you end up on a very old train on the Manchester to Peak District routes. With visitors, if you're trying to encourage them to change habits and move away from cars, the first impression counts every time and getting them to use it after a bad experience is even harder"*
>
> *– Jo Dilley, Marketing Peak District and Derbyshire*
>
> *"The airport's busiest time of the day is 6 am. From an outbound perspective, for a visitor wanting to return home it can be difficult to use public transport to get to the airport for a 4 am check in"*
>
> *– Robin Tudor, Liverpool John Lennon Airport*
>
> *"Air travel and appropriate connections to northern cities is important to attract international conferences, thereby stimulating northern businesses"*
>
> *– Jane Longhurst, Meetings Industry Association*

7.2.5. Theme 5 – Public Transport Integration and ticketing

The concept of integration and ticketing across the North was a recurring theme throughout the stakeholder workshops. Participants mentioned that the North needs a joint and integrated ticketing offer to make using public transport a more seamless experience, and to encourage visitors to use public transport while in the North. The current complicated system of separate tickets for different modes or operators is often difficult for visitors to navigate, particularly for international visitors; this can intimidate and deter visitors from utilising public transport.

> *"Smart ticketing is both an opportunity and a challenge. When we have international visitors arriving at the airport, they're often looking at spending time exploring what the Yorkshire region has to offer. There is a huge amount of tourism associated with the area, but current ticketing is confusing for a non-UK based arrival to understand, to have smart ticketing in whatever form or shape it takes provides a great opportunity for encouraging the non-UK based visitors to explore a wider area"*
>
> *– Charles Johnson, Leeds Bradford Airport*

The current ticketing offering in the North is also seen as outdated by stakeholders and there is a need to digitalise the system, some using the London Oyster card as a good example. This could then allow for more data collection and sharing on visitors in the region which could feed into creating a better transport offer within the North. Though, as mentioned by stakeholders, there are some constraints to this. For example, with trains, most ticket sales are through third party websites which doesn't allow for data sharing. Furthermore, integrated ticketing at the moment is a struggle where operators may have incompatible systems which will not allow for a joint ticketing offer.

> *"Data sharing is an important issue to get right, we can only do this with customers that have bought with us direct but 80% of customers buy their ticket through 3rd parties. We want to find a way as an industry to be able to have access to the customers that are travelling with us"*
>
> *– Representative of long-distance train operator*

Some stakeholders had managed to launch innovative products within the confines of existing ticketing regulations. However, this was not always straightforward, with stakeholders identifying some operators to be more open to co-developing these products than others. Where products and services relevant to visitors are available, they are not always well marketed and therefore do not have recognition or use amongst visitors to the North.

> *"We have got virtual rail stations, e.g. Pickering, where people can buy a through rail ticket to these places including train and bus. Having it all on one ticket breaks down the barriers to making these journeys"*
>
> *– Alex Hornsby, Transdev*

The responses during the workshops on transport integration and ticketing show that stakeholders believe and agree that there is a strong need for an integrated transport and ticketing system across the North. This will not only make travelling easier across the North for people visiting but will also provide the North with an up-to-date integrated system where data can be collected on travel patterns and shared across stakeholders. However, challenges currently arise in terms of the popularity of third party ticket vendors, meaning this data is not available; there may be an opportunity for TfN to regulate and facilitate enhanced data sharing.

> *"We want people using public transport so want to incentivise them in a sensible way, a family ticket that covers the North would cater to that. Go North East do a ticket from the Scottish Borders, to Carlisle, down to Scarborough and everything in between across to Carlisle, a day explorer ticket which is trains, buses, ferries but hardly anyone knows about it. If we could have it across the North we could start to disperse people around the region and get them away from the honeypots and get them into the less well known areas"*
>
> *– Michelle Gorman, Visit County Durham*

7.2.6. Theme 6 – Marketing

The need for increased and more effective marketing came up during the stakeholder workshops. Discussions revealed how there is insufficient marketing of some key and unique aspects of the North that can attract more visitors. Stakeholders suggested public transport journeys, provided they are good quality, could be marketed as part of the experience of visiting the North, while scenic train and bus services which run through areas of natural beauty could be more widely marketed as an attraction in their own right. This would enable the marketing of places alongside public transport services, potentially appealing to people who have reservations about using public transport after the pandemic.

> *"Can we sell more of the journey as the experience? Scenic bus and rail journeys – Settle to Carlisle is a good example. Are there others we can also market as an experience? Can we think more about integrating modes of travel as both an outward and return leg? You don't want to limit people to circular walks – walk one way, visit a pub, then get the bus back – integrate active travel into Public Transport"*
>
> *– Peter Stephens, Stagecoach Bus*
>
> *"The ability to get to great leisure destinations in the North is something we don't market enough, and we are very fortunate to have in the North… In terms of Public Transport, there are some great examples, I will big up our Coastliner, we worked hard on this. Stagecoach also do a great job in the Lake District with their open top services"*
>
> *– Alex Hornsby, Transdev*

The marketing of a safe return to public transport is vital to make visitors feel comfortable visiting the North sustainably. This would need to be backed up by consistent monitoring of demand, management of over-crowding, and social distancing measures.

> *"We have invested so much in cleaning the trains but the messaging from the government is that public transport is not safe. Also, if social distancing does remain in place, there will be capacity issues. All it takes is one busy train that makes you feel uncomfortable that you won't come back again"*
>
> *– Representative of TransPennine Express*

Stakeholders also identified the need to develop better links with tourism attractions to facilitate more journeys being undertaken by sustainable modes.

> *"We need to market public transport travel more effectively. Tourism attractions also need to do a better job of marketing the public transport services that serve them"*
>
> *– Duncan Wise, Northumbria National Park Authority*
>
> *"There has to be better collaboration between the transport operators and tourism companies in terms of marketing campaigns as these are great routes to market. This kind of strategic approach to promoting the services is critical."*
>
> *– Peter Sandman, Liverpool City Region Growth Hub*

From stakeholder comments it could be said that marketing the North to visitors should take more of a targeted approach, especially with the easing of restrictions, marketing should be focused on marketing of a safe return to public transport to ensure visitors can be confident that they are safe visiting the North.

7.2.7. Theme 7 – Post Covid impacts and changes in demand

An unsurprisingly recurring theme during the workshops was the impact of Covid-19 and potential changes to demand post-pandemic. There were concerns over the expected rise in visitor numbers due to the increasing demand for staycations this year, resulting from international travel restrictions and general concerns regarding Covid-19. This may lead to an increase in the number of people travelling to and within North on public transport, putting greater pressure on public transport infrastructure and potentially causing the overcrowding of trains. In order to manage the number of customers on services, some train operating companies have put reservation systems in place to guarantee social distancing capacity is not exceeded. However, this has not been implemented by all operators, therefore further contributing to existing issues around uncertainty and service inconsistency. This increase in staycation demand has the potential to result in a car-led resurgence and traffic overcrowding, as visitors choose to use their private vehicles to travel to the North.

> *"Across the Peaks, some of our attractions are losing out on people that have booked because they can't park their car, or they've missed their timeslot because they've been stuck in traffic to get there."*
>
> *– Jo Dilley - Marketing Peak District and Derbyshire*
>
> *"People are now travelling to harder to reach areas such as Buttermere, however a lot of people are doing this. These areas don't have the infrastructure to cope with the visitor numbers we are seeing, especially parking as public transport use has been discouraged."*
>
> *– Gemma Proctor - Cumbria Tourism*

Private transportation options may become more attractive to visitors as a result of the pandemic. Public transport infrastructure and provision in some parts of the North does not meet the needs of visitors, especially in rural hotspots, making private vehicles easier and more attractive to visitors. Visitors are also making more last-minute bookings for holidays as a result of the pandemic, this can be a problem when booking trains as train tickets usually have a last minute premium, which may lead visitors to rethink their transport mode and use a private vehicle instead.

> *"Booking times are decreasing and more spontaneous holidays are increasing. People are taking more stays for shorter periods with very little booking times"*
>
> *– Kurt Janson - Tourism Alliance*
>
> *"Pricing – booking a train ticket last minute can increase the price dramatically. If you don't book in advance then you don't get as much value for money and this doesn't encourage you to use public transport"*
>
> *– Michelle Gorman - Visit County Durham*

The pandemic has also led to marked shift in travel patterns and visitor demographic, with visitors choosing to travel on previously less popular days of the week, such as Sundays. Some destinations in the North are now seeing a marked shift in the demographic, and while broadly welcomed, visitor expectations amongst these groups are markedly different, especially with regards to their expectations surrounding the availability of public transport.

> *"COVID presents an opportunity in some ways – e.g. as a result of the demographic change. We now get more urban visitors who are more used to using public transport. However, their perceptions of public transport are different – they expect there to be greater service levels than there often are."*
>
> *– Gemma Proctor - Cumbria Tourism*

Despite the challenges outlined above, there are opportunities that can be exploited following structural and behavioural changes resulting from the pandemic. Increases in working from home, and shifts towards more flexible working patterns, may lead to increases in the availability of leisure time for some people. From a transport perspective, reduced commuter numbers could enable the North's public transport networks to focus more on leisure and other discretionary travel, however a reshaping of services to better meet the needs of a wider range of customers may be necessary. TfN can look to maximise these opportunities and encourage visitors to move away from the private vehicle when visiting the North after restrictions ease, by marketing and promoting a safe return to public transport across the region, and examining how service offerings may need to change in line with shifting customer needs, habits, and expectations.

7.2.8. Theme 8 – Sustainable growth

A key theme that came up during the stakeholder workshops was the importance of ensuring sustainability amongst visitors when coming to the North. As it is predicted that visits to the North will increase due to post-pandemic staycations and demand for leisure, there is more pressure to make sure that the growth in visitors to the North is sustainable. Finding ways to encourage people to use public transport in the North will be key to ensuring a sustainable growth in visitor numbers. Taking advantage of the changes from lockdown such as increased cycling and walking as well as changes in visitor behaviour will encourage more sustainable choices when visiting the North. In terms of changes in visitor behaviour, younger visitors and more environmentally aware demographics will be willing to use public transport more if things were made easier, for example by providing better access, reliability and information on public transport in the North.

> *"Encouraging people to make sustainable choices will be key – we need to help people to see where and when buses and trains are going and to make things easier for people to not take the car. We need to also seize changes which have happened during lockdown, for example increases in walking and cycling."*
>
> *– Nicola Said, Marketing Cheshire*
>
> *"We also need to do more to decarbonise travel. Generation Y and Z are more interested in environmental issues and very astute when choosing destinations, examining the environmental credentials of tourism business far more critically for example. They are also seeking out more authentic experiences, immersing themselves in the community and the place, rather than being regarded as 'transient visitors*
>
> *– Duncan Wise, Northumbria National Park Authority*

The North could take advantage of these demographic changes by encouraging and marketing sustainable travel and tourism. Not only could this encourage the uptake of sustainable transport across the region, but it could also attract new visitor demographics who are environmentally aware but may not have previously visited the region.

7.2.9. Theme 9 – Collaboration

During the workshops, participants were asked to describe their Northern Transport Utopia for visitors, thinking about an ideal transport system for future visitors to the North. Most answers included integrated ticketing and multi-modal transport across the North. When asked how we could achieve this, there was some opposition to the need for central government intervention apart from funding, with stakeholders expressing a preference for solutions led by organisations based within the North. Stakeholders also identified that collaboration with local authorities can be challenging, with misalignments of priorities between different public sector bodies being common.

> *"There is a role for both local and national stakeholders to help coordinate in this space. TfN have got a major role in this."*
>
> *– Gemma Proctor, Cumbria Tourism*
>
> *"We have an opportunity to work with other operators for the final mile (cycle hire, car hire, integrating with bus operators). We can be a bit more innovative about looking at these things than we have in the past through collaborations."*
>
> *– Representative of TransPennine Express*

However, participants identified there is a leadership opportunity for TfN to facilitate industry collaboration and bring together different key stakeholders such as local authorities, transport operators and areas of key interest to encourage a collaborative transport environment rather than a competitive one.

> *"TfN could play a leadership role in bringing these things and stakeholders together so we don't end up in a competitive position but a collaborative one - really using the pandemic as a catalyst for change. We want to promote the use of train, and have a lot in common with operators across coach, bus, rail and airport"*
>
> *– Chris Brown, Marketing Liverpool*

There is opportunity here for TfN to take a role in facilitating the collaboration of key industry stakeholders for both transportation and the visitor economy. This will allow for better understanding of common issues across the North and generate ways to collaboratively to solve them.

7.2.10. Post COVID Transport Solutions

During the workshops, stakeholders were presented with six different incentives, designed to encourage users back onto public transport following the lifting of Covid-19 restrictions between April-June 2021. Stakeholders were asked which solutions were most important for the North. The table below shows a traffic light analysis of responses to the different transport solutions developed from the collective general sentiment displayed towards each option by stakeholders participating in the study.

Table 7-1 - Stakeholder sentiment toward potential post-Covid transport solutions

Post COVID transport solutions			Score
1	**Cheaper public transport**	This received a mixed reaction as many agreed that cheaper transportation is needed, costly transport acts as a barrier to using public transport when visiting the North especially with trains and last-minute bookings. This is hard to facilitate, however initiatives like combining tickets with other modes or attractions will provide more value for money when booking tickets.	
2	**Better park & ride schemes (to encourage visitors to travel to their final destination via public transport)**	Stakeholders mainly agreed that while park & ride is a good initiative in urban areas for first and last mile transportation, park & ride is not suitable for rural areas. This is because connectivity and transport frequency within these areas are not the best, so once visitors leave their vehicles there may be issues with getting around. It is important to carefully consider where to place park & ride initiatives to ensure maximum visitor uptake.	
3	**Improved public transport connectivity from where visitors live**	Stakeholders agreed that connectivity is an important aspect that needs to be addressed in the North, especially travel within the North when visitors arrive. Poor connectivity within the North discourages visitors from taking public transport and instead use their private vehicles.	
4	**Access to cycle hire/e-scooters/e-bikes at your Northern destination**	Stakeholders agreed that while cycle and scooter hire is a good initiative for active travel and sustainable ways of transport, there is an issue with visitor uptake. Stakeholders perceived a reluctance to use cycle hire as it is common for visitors to bring their own bikes if this an activity they plan on doing. There could be more done in marketing and placement of these cycle hire schemes to encourage more uptake.	
5	**An electric vehicle that visitors could easily and cheaply use during their stay**	Comments on EV hire were mixed as this could be a positive for last or first mile journeys from stations or travel hubs, however, this will add to the current congestion and parking issues in the North. The high volume of cars visiting the North sometimes means that parking is hard to find and congestion is high at peak times.	
6	**Combined attractions/accommodation and transport tickets**	In all the workshops, this option seemed to be favoured by stakeholders as a key area to invest in. It was agreed that visitors need well targeted, easy to book transport offerings included with their attraction or accommodation tickets. This will encourage the use of public transport if this is all integrated, as well as increase their awareness of what public transport options are available to them while visiting the region. Stakeholders also identified that small numbers of combined travel/attraction entry tickets, and other visitor/tourism oriented ticketing products currently exist, however they are not well marketed at present.	

Table 7-1 outlines stakeholder sentiment towards a number of potential options to improve visitor journeys within the North of England. The general consensus amongst stakeholders identified that solution number 6, combining public transport tickets with attractions and accommodation, is the most popular option and was generally identified to be prioritised amongst those attending the workshops. Solution number 3, improving transport connectivity in the region, was also popular with stakeholders. There is opportunity here to undertake further work with stakeholders to explore how these solutions can be addressed and potentially accomplished.

Stakeholders also had the following to say about these various options:

"Park and ride is a tough concept, it doesn't seem to work brilliantly anywhere. We supported opening one in York, people will use it if they have no other choice. It's a tough scheme to try and sell"

– Nick Chamberlin - British Cycling

"There is a difference between the solutions which are suitable for an urban environment and a rural environment e.g. road charging and park and ride are not suitable [for rural areas]."

– Gemma Proctor - Cumbria Tourism

"We've had requests for combined attractions/accommodation and transport tickets before. The difficulty is that it's not easy to do that. For us, our website is managed by a third party, and any development has to be developed by them in terms of the booking flow. They have a monopoly on that market, and charge a lot to be able to do that."

– Representative of East Midlands Railway

"we have started some separate work with Blackpool council asking them on the impact that covid has had on their resort… They suggested a resort focused holiday package – the coach industry does this already but rail does not. Also, promotion of ticketing products such as family tickets are not marketed enough."

– James Syson - TfN

"We do that to some degree throughout the summer, working with a bus operator and some attractions. If you travel to an attraction via bus, you might get discount. We have to be careful with pricing, making sure we're inclusive for lower income families so that people aren't forgotten about completely. Pricing is a key priority. There are different scales. I spoke about cost being a barrier to people travelling by public transport. As a holiday destination, there is a need for lower pricing across the board. Pricing needs to be looked at, if prices are lowered across the board then yes."

– Michelle Gorman - Visit County Durham

"More minor services would benefit both local residents and visitors."

– Gemma Proctor - Cumbria Tourism

"one of the recommendations is to change the legislation to allow [scheme] number 6. There's a real barrier that if you sell transport and accommodation, you're automatically deemed to be a tour operator. The person selling it becomes legally liable for anything that happens to the customer even if it happens at the other business. We are trying to change the regulation, devised by the EU and could be one of the benefits of Brexit."

– Kurt Janson - Tourism Alliance

"Very supportive of High Speed 2 addressing the needs of the business traveller – i.e. getting there fast – doing business – getting back fast!"

– Jane Longhurst, Meetings Industry Association

"a lot of what is on that list is not new but we are still unable to put a lot of them into practice."

– James Syson - TfN

7.3. Conclusions

The conclusions below are themes which most strongly emerged from our primary research with transport and tourism stakeholders and which also link back to our study objectives outlined in section 1.1.

Ticketing, integration, and network coverage

- Stakeholders identified current public transport services did not meet the needs of visitors, especially in rural areas, and on east-west routes.
- There was a lack of integration between modes, both in terms of connectivity and ticketing.
- Concerns were raised that recent gains around industry collaboration could be eroded as companies compete for customers as public transport use recovers.

Funding

- Cuts to local authority transport funding over recent years have led to an erosion of bus network coverage and frequencies, especially services which cannot be operated on a commercial basis, and particularly in some rural areas.
- Where funding for new services or initiatives is available, it is often time limited; new services or initiatives take longer to become established than funding support is available for.

Active travel and micromobility

- The North has a strong active travel offer, attracting visitors to walk or cycle through beauty spots.
- Public transport services have insufficient active travel facilities, preventing visitors from taking their preferred bike with them to their destination. A conflict between current policy and customer preference was identified.
- Transport hubs need to provide a range of facilities to aid last mile journeys, provide enhanced levels of information, and support for visitors with reduced mobility.

Marketing

- Potential to market scenic public transport journeys as part of the experience of visiting the North, providing the service is of sufficient quality. Current examples include the Yorkshire Coastliner bus, and Settle-Carlisle railway line.
- Joint marketing of visitor attractions, and sustainable transport routes, considered a high priority.
- Potential to influence the increasingly environmentally aware generations Y and Z to make more sustainable choices, and visit a domestic destination such as the North.

Recommendations and Conclusions

8. Conclusions and Headline Findings

This report has presented a baseline account and profile of the North's visitor economy, by outlining existing research into the sector, describing the size, value and profile of the North's visitor economy, and exploring the transport demand generated by the visitor economy. This report has also identified the importance and value of the visitor economy across the North, including the sub-sectors which make up the North's visitor economy. The role transport plays in supporting the visitor economy has also been explored and explained via secondary data analysis and primary research. Finally, this report has provided an analysis of the impact the Covid-19 pandemic has had on the North's visitor economy, from data provided by Northern visitor economy stakeholders and from qualitative research with transport users. This project has developed recommendations for TfN and TfN's partners regarding potential interventions and policies to support the short-term recovery of the sector in the context of Covid-19, and to stimulate the longer-term sustainable growth of the visitor economy. These will be detailed in the following pages.

The North is rich with a large array of natural, historical and leisure assets, including National Parks, Areas of Outstanding Natural Beauty, and UNESCO World Heritage Sites. These assets make a significant contribution to the society, culture, and environment of the North of England, making the region not only an attractive place to visit, but also live and work in. The North's natural and built environment assets are enjoyed by residents and visitors alike and contribute to the strong reputation of the region.

The North is a popular region for visitors, with 420 million visits being received by the region during 2019. Across the North, there are approximately 39,000 businesses within the visitor economy, providing employment to approximately 579,000 people, with further businesses and employment being supported within the supply chain. Analysis undertaken for this study has identified there was a total visitor spend of £21.05 billion across the North in 2019, with a total net GVA contribution of £12.33 billion.

The North's cities are important hubs for the region's visitor economy, receiving the largest numbers of visitors, and supporting the greatest numbers of businesses and jobs. However, the visitor economy is also important to the North's rural areas and market towns, where often a large proportion of economic activity is attributed to the visitor economy. For the Boroughs of Scarborough, Blackpool, and South Lakeland, over 12% of businesses are part of the visitor economy. In Richmondshire, Derbyshire Dales, Scarborough, Staffordshire Moorlands, Eden and South Lakeland, over 15% of employment is attributed to the visitor economy. For these places, the visitor economy is intrinsically linked to local prosperity and wealth.

Prior to the Covid-19 pandemic, the visitor economy was a significant contributor to overall economic value and output in the North of England and was predicted to grow at an annual rate of 3.8% through to 2025. During the Covid-19 pandemic, the visitor economy has faced unprecedented challenges as people have been unable to travel, socialise, and enjoy the rich and diverse visitor offer available within the North of England. The impact of these restrictions on the North's visitor economy has been profound; cities such as York received 67% fewer visitors in winter 2020 compared to winter 2019, and businesses in the Peak District National Park reported an expected 58% loss of revenue from June-December 2020 compared to the same period in 2019. Similar challenges have been faced by other areas across the North.

Despite these challenges, this report has identified significant potential for the North's visitor economy to flourish from an increase in 'staycations' due to the pandemic effect; the last such boom occurred in the years following the 2008 Financial Crisis, when lower spending power, employment uncertainty and higher costs for overseas travel led to a shift towards domestic travel. The impacts of the Covid-19 pandemic have brought about similar structural conditions, with the addition of concerns regarding the safety and health impacts of foreign travel, travelling in close proximity to other passengers, and ongoing border restrictions. A further staycation boom is therefore a possibility, and something which the North should encourage and ready itself for.

From a transport perspective, analysis of National Travel Survey and Transport Focus data has identified that a higher proportion of intra-north visitor trips are made by car in comparison to visitor trips to the North from other parts of England. This suggests a significant risk to the North's environment, and the sustainability of the North's visitor economy, without interventions to encourage greater use of other transport modes. Evidence suggests that without mitigations being made, or improvements to public transport, it is unlikely that future visitor/leisure trips would be made using sustainable modes, particularly if the journey were within the North.

Public transport may also continue to face significant challenges even as Covid-19 restrictions are eased, especially if public confidence is not restored following the roll-out of Covid-19 vaccines and a reduction in the community transmission of the virus. This report has identified a demand from transport users in the North, and those who live outside the North, for more incentives to encourage public transport use, micromobility use, and active travel journeys, when visiting the North for leisure and tourism purposes. This especially includes promoting package deals for transport tickets, accommodation and/or attractions, providing easier access to micromobility modes such as e-scooters/e-bikes at stations/mobility hubs in the North to make last-mile journeys easier for visitors, and providing improved facilities for taking bikes on public transport and storing these securely at stations. Other incentives include better overall public transport connectivity, including more direct services, and providing electric vehicles which could be hired at train stations to encourage visitors to leave the car at home for rural or multi-destination stays.

Overall, however, this report has identified a great affection for 'the North', and the importance of its towns, cities, and visitor attractions. Both residents and non-residents of the North exhibit generally positive sentiment regarding visits to the North for a day trip, weekend stay, and a longer (4-7 night +) stay. There is a significant opportunity to market the North in a more co-ordinated way to visitors and potential visitors, and to strengthen the North's visitor economy brand.

The stakeholder engagement undertaken for this report has included discussions with a wide variety of local authorities, local enterprise partnerships, destination management organisations and transport operators from across the North. Many stakeholders face challenges when seeking to offer joined up transport interventions, incentives to switch to greener modes, and initiatives to encourage visitors to the region. This was especially the case when trying to cut across the North's political and geographic boundaries to serve a wider market. Stakeholders have enthusiasm to increase the market for public transport and other sustainable modes by working together to create a stronger pan-Northern visitor economy. However, it is acknowledged that many barriers need to be overcome to make this a reality, including the regulation of packaged ticketing products, siloed thinking and localism, funding support from government for long-term services specifically targeted at the visitor economy, and challenges surrounding collaborative working. Stakeholders identified TfN as an important organisation to help facilitate and support the North's visitor economy stakeholders, broadly welcoming a future partnership approach to supporting the sustainable growth and recovery of the North's visitor economy.

9. Recommendations

9.1. Introduction

The following recommendations have been developed in direct response to the evidence presented in the previous chapters of this report, taking into account the economic profile of the North's visitor economy, the transport demand generated by the North's visitor economy, and the views and experiences of residents and stakeholders. Each recommendation has been developed with the aim of making transport easier to use, better value for money, and better aligned to the needs of visitors travelling to and within the North of England. The recommendations also take into account the views and priorities of stakeholders from the North's visitor, leisure and transport sectors. The recommendations themselves have not been subject to costed analysis or complete development, instead they are designed to provide a framework for TfN to consider their policy position and response to the Covid-19 pandemic from a leisure and tourism perspective, and should be subject to further study and development prior to implementation. As a next step, it is recommended that TfN collaborates with key partners and stakeholders to develop action plans identifying opportunities and actions for implementation, focusing on rail in the first instance.

9.2. Recommendations

Increased safety messaging and a communications campaign to support and encourage post-Covid travel on public transport

Many participants remained anxious about returning to public transport as travel restrictions eased, instead preferring private modes such as car or taxi. This poses a challenge to the sustainable recovery of the North's visitor economy.

Research undertaken with residents and stakeholders as part of this study has identified a divide between transport users who are keen to return to public transport for leisure trips following the relaxation of Covid-19 restrictions, and those who are not ready to take this step for various reasons. A 70/30 split was observed amongst those participating in the focus group sessions, with the majority expressing nervousness to return to public transport within the near future. For these participants, use of the private car was perceived to be significantly safer than travelling on public transport, due to concerns regarding distancing, cleanliness, air filtering, and risk of exposure to Coronavirus. A subset of this group expressed significant concerns regarding ever returning to public transport; a combination of safety fears related to public transport, and new patterns of behaviour and mobility which had formed during the pandemic and lockdown restrictions, mean this group will continue to travel exclusively by private modes such as car and taxi. A further sub-group were keen to return to public transport, however felt unable to do so as government messaging was perceived as being yet to approve the use of public transport for leisure journeys.

It has been interesting to note how the views of focus group participants have largely not been impacted by efforts public transport operators have made to ensure their services are as safe as possible, for example through enhanced cleaning and distancing guidelines. Industry stakeholders provided evidence of the lengths their organisations had gone to, often at great expense, to ensure buses and trains were safe and clean environments. While these efforts were welcomed, public transport was still perceived negatively by some residents due to concerns regarding the behaviour of fellow customers, which will be beyond the control of transport operators. Operators also recognised the need for public transport to be perceived as providing an excellent service by customers to encourage users back on board. Alongside messaging around cleanliness and safety, some stakeholders also felt investments needed to be made to stimulate a post-Covid return to public transport – this could be in the form of incentives such as short-term promotional offers or free trial tickets.

In order to aid the return to public transport, the North's transport operators and community rail partnerships, supported by TfN, should consider the development of a unified pan-Northern communications and marketing campaign, potentially bringing some of the existing campaigns being led by the North's transport operators under one umbrella, while also aligning with national campaigns. This should be launched at an appropriate point along the government's re-opening roadmap in 2021, to encourage the use of public transport for leisure purposes in line with prevailing guidelines on service capacity and social distancing. Based on the findings of this research, the campaign needs to provide reassurance that public transport is a safe mode of travel, and also needs to remind the public of the benefits of public transport – the freedom of not having to find and pay for parking, not having to concentrate while driving a long distance, and not facing delays due to congestion on the road network. Where possible, the marketing campaign should look for political support to aid the messaging campaign. During the pandemic, the public have become used to the messaging, advice and guidance provided by senior politicians at a regional and national level, and a message from Ministers or regional Mayors that public transport is safe, alongside the promotion of any incentives, is advised to create the most impact to support the return of demand for public transport trips. Emphasis however should be put on the use of incentives and behavioural nudges to encourage previous public transport customers back, such as targeted discounts, enhanced loyalty schemes, and messaging around the environmental benefits of using public transport. A successful marketing campaign, which aids the recovery of public transport patronage across all modes and operators, while taking into account potential capacity constraints at peak times, would support the sustainable recovery and growth of the North's visitor economy, by connecting people to visitor hotspots in a safe, sustainable, and environmentally friendly manner.

Provision of better-quality active travel facilities on public transport and at visitor economy hotspots

To encourage visitors to the North to make more journeys via active modes, and to further explore the North's diverse network of paths, trails, and rights of way, investment in key gateway facilities and wayfinding infrastructure is required.

The Covid-19 pandemic has led to a large increase in the number of journeys being undertaken by active modes, supported in many places by initiatives such as low traffic neighbourhoods, cycle lanes, or pedestrianisation of town centres. These changes have been made in line with a growing appreciation of environmental issues amongst the public, and a growth in sustainable travel. However, many participants faced barriers when combining active modes with public transport services, as existing carriages do not have sufficient space for bikes, and many railway stations do not have secure, covered cycle storage facilities. Amongst participants in this study, there was a preference to take their own bike with them as opposed to hiring a bike at their destination; this was especially the case when taking an active holiday in a location like the Lake District or Peak District. Participants described how having their own familiar or specialised bike with them would be an important element of the experience. In urban areas, participants were open to the use of emerging micromobility modes such as e-scooters, however, awareness of their potential was limited.

Stakeholders felt the North's cycleways and rights of way were a key attraction for the region, and welcomed the mainstreaming of e-bikes, which have the potential to enable a greater uptake of cycling and active travel, especially in locations with challenging terrain. While stakeholders appreciated keen cyclists may prefer to carry their bike with them on the train, as opposed to taking advantage of cycle hire facilities, it was noted this preference was in conflict with historic policies which have seen the removal of much cycle storage onboard trains in favour of additional seats. There was recognition amongst stakeholders this may need to be reviewed in a post-Covid context where active travel has become increasingly encouraged. Some stakeholders also noted the challenges of providing cycle hire in many rural areas; it was felt unless there was sufficient coverage of cycle hire, the market could be limited, as one-way hires, which are popular with visitors, may be difficult to implement, although some innovative activity is already happening in this space, which stakeholders were keen to further encourage.

Active travel will be an important aspect of the sustainable recovery and growth of the North's visitor economy, offering great potential for the sector as both an activity and mode of transport. TfN should look to support the growth of active travel across the North's visitor hotspots, being mindful that solutions which may be suitable for urban areas, such as pedestrianisation, wayfinding, and micromobility, won't necessarily be suitable for the North's rural areas. For these locations, accessible off-road cycleways and footways, and the trial of a dense cycle hire network, would be more appropriate. TfN, working with the North's bus and train operators, and their rolling stock asset owners, should further consider how services can better cater for the needs of customers who wish to transport bikes as part of their journey. While general demand for rail services remains suppressed, this could include the relaxation of rules regarding bikes on board trains, or the removal of seats to accommodate greater numbers of bikes. On key routes, the provision of carriages dedicated to active travel may be appropriate; trials are currently underway involving ScotRail services on the West Highland Line.

Promotion and development of ticket offers and packages

Discussions during focus group sessions revealed the North could make more of its existing transport network through enhanced marketing and availability of discounted tickets, ensuring potential visitors to the region are aware of the best deals. Participants viewed the current system, where individual tickets need to be purchased for each journey or mode as offering poor value for money and disincentivising the use of public transport for visitor journeys.

Challenges around the cost and complexity of the North's current public transport offer were identified universally across all focus groups, with respondents indicating the need for separate tickets for different modes or different operators on the same route as a major barrier to using public transport for leisure journeys. 60% of participants who took part in our focus groups agreed that cheaper public transport would enable them to visit the North more often for a weekend or longer trip, while 69% of participants agreed that cheaper public transport would encourage them to visit the North more frequently for a day trip. Other respondents identified that for longer stays, a ticket or pass which provided access to all public transport services across the North would be beneficial, as it would more easily and cheaply facilitate a touring holiday of many of the North's main cities and attractions. The challenges surrounding public transport articulated by participants led them to compare the North unfavourably to cities like London, where easy access to frequent public transport services across modes and operators via a smartcard is the norm.

Industry stakeholders were receptive to many of these themes, however expressed the need for major reform and integration of ticketing systems and platforms, plus support from government organisations or industry bodies, to enable this change to occur. Recent announcements are encouraging in this area, such as the reforms proposed by the DfT's Williams-Shapps Plan for Rail[134] which has already led to the introduction of flexible season tickets from 21st June, with more general reforms to fares and ticketing planned as the recommendations are further implemented. This includes the development of multi-modal ticketing products, and the integration of fares and ticketing under the control of local leaders. TfN should look to champion the needs of the North through this process, ensuring developments within the region positively benefit residents and visitors alike. The recently published DCMS Tourism Recovery Plan[135] also highlights the importance of fares reform to accelerate the recovery of domestic tourism. The plan calls for the Rail Delivery Group, government, and VisitBritain to work together to develop a new domestic rail tourism product to build upon the success of similar products such as the BritRail pass. TfN and the North's destination management organisations should look to contribute to the development of this product to ensure it meets the needs of visitors to the North of England.

Alongside the development of new ticketing products and offers, awareness of existing offers and discounts was found to be limited amongst participants in this study. This includes products such as PlusBus, Railcards, GroupSave, and Rover Tickets. The distribution of these products, especially Rover Tickets, is also currently limited to station ticket offices, therefore adding a further barrier to their use. Ensuring existing leisure orientated products are well marketed and made easily available through popular sales channels will contribute to providing easier and more affordable journeys for visitors to the North. TfN should support the North's transport operators, community rail partnerships and the Rail Delivery Group to ensure better promotion and more widespread availability of new and existing products, therefore contributing towards the easier and more cost-effective use of public transport amongst visitors to the North.

As a longer-term goal, the availability of package deals (such as combined transport/accommodation or transport/attraction entrance deals) for visitors to the North has been identified as a priority from the research findings of this study. While this type of product proved popular with residents, stakeholders identified a number of potential challenges to be overcome, such as implementation costs within existing ticketing and booking systems, and regulatory barriers which mean the vendor of combined accommodation and transport packages would need to abide by Tour Operator rules and would consequently expose themselves to the additional legal obligations and liabilities generated by operation within this sector. TfN should support the collaboration of transport and tourism operators to attempt to overcome these barriers, ensuring customer centric solutions are enacted, making visits to the North easier, cheaper, and better integrated.

[134] https://www.gov.uk/government/publications/great-british-railways-williams-shapps-plan-for-rail
[135] https://www.gov.uk/government/publications/tourism-recovery-plan

More reliable and joined up services that reduce journey times, changes between services, and uncertainty for visitors

***Poor coordination between public transport services was identified as a key area of concern amongst focus group participants, and was highlighted as a key barrier which prevents visitors and residents of the North from exploring the region more*.**

Issues surrounding the unreliability, uncertainty, and poor connectivity of the North's public transport services were common throughout all the focus groups. In general, services within the North of England were identified as having a particularly poor perception of service quality, with overcrowding, cancellations, and general unreliability being common issues. Services between the North's core cities were identified as being particularly slow and overcrowded, especially when compared with rail links to London. The need to often take a connecting service when completing a journey was identified as a specific issue. Where connecting services need to be taken to complete a journey, long interchange times can lengthen journeys, making public transport uncompetitive with other modes. Accessibility analysis identified the importance of providing through services to minimise journey times, therefore ensuring rail is competitive with other modes. HS2 and NPR will bring significant journey time improvements to many of the North's core cities and towns, however the integration of these new services with places they do not directly serve needs to be carefully managed to ensure the benefits are felt across the North. Public transport was also perceived to not cater for weekend or evening journeys, which are important for the visitor economy. This perception was verified through the analysis of bus frequency data, which highlighted the drop in density and frequency of services in the evening, even in relatively urbanised areas.

These views were mirrored by stakeholders, who also perceived east-west connectivity as requiring urgent improvement to encourage visitors to the North to further explore all the region has to offer. Stakeholders also identified issues with the consistency of the North's public transport provision. Stakeholders welcomed recent improvements, with some services now being operated by new or upgraded trains. However, stakeholders identified some pockets of services where older or lower quality rolling stock remains in use. The lack of consistency was regarded as a significant barrier to encouraging the use of public transport. Additionally, stakeholders identified a lack of suitable public transport services to tourist sites and areas of natural beauty; where services do exist, they were deemed too infrequent, and sometimes unable to cope with surges in tourist demand during periods of high demand. HS2 and NPR were welcomed by stakeholders, who felt the ability to reach many places in the North with greater speed will be an important boost for the region, especially for day visitors and business visitors.

70% of participants indicated that improved public transport connectivity would encourage them to take more day trips to the North of England, while 58% stated this would encourage them to take a longer trip to the North. Many leisure journeys are made by groups or families, often with luggage; needing to change trains was perceived as a significant barrier to public transport use by these groups. In order to overcome these issues, Network Rail, the North's transport operators, and TfN, should consider how the North's future rail services can be planned to minimise the need for interchange on key flows for the North's visitor economy. This may also require business case evaluation to have an emphasis on the importance and value of the visitor economy, therefore requiring changes to existing appraisal guidance. Consideration of the seasonality of demand for services to some of the North's visitor hotspots will be important; this could be achieved by providing additional through services tailored to the needs of visitors dependent on the prevailing season, for example to coastal resorts and beauty spots in the summer, and to seasonal destinations during the winter. The North's train operating companies should also work towards improving the consistency of services on key lines, ensuring they are operated by a uniform fleet of rolling stock which provides a consistent customer experience.

Coach and bus are also important modes which can be further leveraged to support sustainable visitor travel in the North. Services to some of the North's most popular rural visitor economy hotspots suffer from low frequencies and limited operating hours, meaning they fail to provide a viable alternative to the private car. This issue is not unique to rural areas, with frequencies in some urban areas also declining post evening peak, therefore failing to support the North's night-time economy. In order to ensure the sustainability of the North's visitor economy from both an environmental and transport perspective, it will be important to ensure all key destinations are provided with a viable alternative to the private car. The diversity of the North means multiple solutions will be required which take into account local context and visitor demographics. These could include enhancements to service frequencies and operating hours of existing services, park and ride services to reduce car journeys to some of the most popular destinations, and dedicated tourist services to facilitate door-to-door journeys between accommodation and attractions. TfN should collaborate with local transport authorities, the Confederation of Passenger Transport, and coach and bus operators to understand the barriers to improving services within the North, and facilitate the provision of infrastructure improvements which support the integration of public transport with active travel throughout the region.

Facilitate easier visitor journeys to and within the North, via customer-centric information, infrastructure and services

For public transport to be adopted by visitors to the North, in particular families or those with reduced mobility, public transport needs to be easy to use, stress free, and accessible. Last mile journeys need to be seamless and cost effective to compete with the perceived ease and convenience of a private car.

For the vast majority of participants, the car currently provides the only feasible mode of travel when visiting the North. Many participants expressed a preference to visit multiple locations across the North; a combination of poor public transport connectivity, coupled with a lack of information, were the key barriers preventing the use of more sustainable modes. Despite the challenges and frustrations with the North's current public transport offer, participants displayed a willingness to use public transport, provided it was easy to access and connected participants to key destinations. Participants were also willing to combine public transport with other modes and forms of mobility; around 50% of participants stated they would be interested in travelling to the North using public transport, then hiring an Electric Vehicle to complete the final leg of their journey. Participants identified a lack of incentives to encourage them to use public transport while visiting the North, especially compared to some European cities where visitors are provided with public transport tickets when checking into their accommodation, paid for by the local tourist tax.

Among stakeholders, there was recognition of the need to make public transport easier to access and understand. Stakeholders felt improved signposting and information at key gateways, alongside improved staffing levels both earlier in the morning and later in the evening, would help to generate a better first impression of the North. For international visitors, the provision of easily accessible information about onward travel options at the first port of arrival to the North (usually one of the North's airports) is particularly important. Some organisations had trialled 'car free itineraries', and leaflets including information on local attractions served by public transport, targeted at visitors to their local area. While these had proved popular, they required a great deal of time to compile and keep updated, which was often not possible without funding and strong collaboration between attractions, destination management organisations, and public transport operators. Stakeholders also identified the added value which could be provided by public transport services if the journey experience is of good quality. The Settle to Carlisle railway line, and Yorkshire Coastliner bus route, were identified as exemplars of such services.

The Covid-19 pandemic has led to major behavioural shifts in many aspects of public life. There has been a significant growth in home working and online shopping, while journeys have increasingly been undertaken using active travel or private cars. As the country adapts to post lockdown life, new behaviours will be created in line with some of the attitudinal shifts triggered by the pandemic. The North's transport operators, and the visitor economy more generally, need to respond to these changes to ensure their offer is aligned to the needs and expectations of visitors. In order to influence the behaviours of visitors, it will be important to make public transport easy to use and hassle free, to win back mode share from the private car, which participants in this study generally perceive as providing the easiest and safest mode of travel when visiting the North. In the short term, this could be achieved by providing enhanced communications to help visitors identify opportunities to explore the North by public transport. This could be supported by the development of car free visitor itineraries, which identify attractions and places easily accessible via public transport. Scenic public transport routes could also be identified, and therefore marketed to visitors as part of their experience of visiting the North.

The role and importance of signage, leaflets and timetable posters needs to be considered carefully; feedback from residents and stakeholders identified their importance and value. The introduction of more 'brown tourist signs' on the North's road network was well received, alongside improved signs for tourist information and wayfinding at train and bus stations in the North. Stakeholders also identified the role played by timetable posters and leaflets, especially in rural areas where mobile internet signals may be poor. Additional signage and information would help visitors to identify 'hidden gems' and make the most of their visit, alongside enabling the development of strategic linkages between visitor attractions and nearby transport routes.

In the longer term, the development of infrastructure tailored to the needs of visitors should be considered. This may include the development of mobility hubs at key domestic and international gateways to the North. For rural areas or National Parks, this could include the provision of seamless interchanges with an enhanced public transport offer, and electric vehicle hire to facilitate last mile access to remote locations. In urban areas, micromobility and e-bike hire could be considered. Disabled customers should be catered for through the availability of mobility aids, such as mobility scooters. Underpinning the concept of mobility hubs would be enhanced levels of customer service, including the presence of staff in the early morning and late at night when many international passengers arrive at key gateways, combined with representation by local tourism bodies to help visitors make the most of their trip. These hub locations could form the gateways to the North's visitor economy hotspots, removing barriers to public transport use, and facilitating the combination of rail or coach with alternative sustainable modes for last mile journeys to remote areas.

Develop an accessible and inclusive visitor economy

To ensure equality and inclusivity, the needs of less mobile and able visitors, and other marginalised members of society, must be considered when developing and improving the North's visitor offer.

For some participants in this study, the impact of conditions which limit their physical mobility presented a significant barrier to visiting the North. Challenges around the availability of information on accessibility and assistance on public transport were a concern, often shaped by previous experiences where information was inaccurate, or assistance was not available. Some modes were identified as posing particular challenges, especially trains and buses which could be crowded, with a seat not being guaranteed. Where facilities did exist, participants found they were not always well advertised, and required considerable research to identify. The ongoing Covid-19 pandemic was a particular concern for this group due to health concerns; consequently, there was less willingness to travel on public transport until the pandemic has subsided. Participants we spoke to with physical disabilities were also more likely to face other intersectional disadvantages such as low incomes and metal health issues, further limiting their independence.

Income deprivation was also identified as an issue more generally for some participants in this study. For this subset of participants, their choice of destination or transport mode was limited by their income, as they sought to choose the most cost-effective destinations and travel modes. For other participants, the cost of travel, especially public transport, limited their ability to visit the North. As previously identified, the North has a greater than average proportion of households which do not own a car; in combination with issues around the cost of public transport within the North of England, this could potentially severely restrict the mobility and economic activity of a large proportion of the North's population. Government data suggests a higher prevalence of income and health deprivation in the North; therefore, transport inequalities are likely to reinforce these existing inequalities without intervention. Inaccessible public transport options can also prevent those on low incomes and/or with additional mobility needs from enjoying the North's natural, historical and built environment assets.

Stakeholders were also aware of the challenges faced by people with mobility or health issues; while much progress has been made with the withdrawal of older and inaccessible rolling stock, it was felt more could be done to ensure the North is accessible and inclusive of all. In particular, many rural or smaller stations were identified as posing challenges not only to mobility aid users, but also to other people who may not identify as having a disability, due to steep ramps or large numbers of steps between platform and street level. Public transport services were also identified by stakeholders as posing a number of issues for disabled visitors, with other travellers often using wheelchair spaces on buses and trains for luggage or bikes, or as standing space on board busy services, making it challenging for disabled travellers to board services. Stakeholders also identified active travel facilities are not always suitable for disabled users, with particular issues being experienced with gates and paths of insufficient width for wheelchairs or adapted cycles.

In order to ensure the North's visitor economy is accessible to all, it is necessary to remove as many barriers as possible, and adapt to the needs of diverse groups. In the short term, marketing and communications tailored to disabled groups which seek to provide reassurance on the safety of public transport, and measures put in place to ensure accessibility, safety, and customer service, will help to reassure visitors who may be reluctant to travel on public transport services. Some participants in the study expressed nervousness to travel alone; providing free or discounted travel for those accompanying a disabled traveller may help to overcome barriers to using public transport. For those travelling alone, being able to guarantee the availability of a seat or wheelchair space, and assistance not only on and off public transport services, but with access to onward travel options, would also be highly beneficial.

TfN and partners must also consider the needs of diverse groups as they develop new transport infrastructure, ensuring that both structural and physical barriers to all modes of transport are removed. This could include the use of Access Consultants and Human Factors specialists during the design of new transport infrastructure, ensuring the needs of diverse groups are identified and included during early-stage design work. The needs of diverse groups should also be considered when planning transport services, for example by providing enhanced public transport services in areas of low car ownership to facilitate mobility. Finally, the North's transport and leisure operators should ensure equality of access to transport and leisure opportunities by considering the introduction of specialised offers for marginalised and deprived groups, therefore helping to remove the financial barriers which can prevent people from visiting the North.

A more joined up approach across the North to better market the region and manage transport demand

In order to more effectively attract visitors to the North and actively manage demand across public transport services to key tourism and leisure destinations, greater collaboration and co-ordination is needed between key stakeholders, with TfN being well placed to lead and enable this.

Knowledge of the North amongst some participants was limited; while cities such as Manchester, Liverpool, and Newcastle, and National Parks such as the Lake District, were generally well known, many other significant aspects of the North's visitor offer were less well understood. For some, this was a barrier to visiting the region, largely through concerns there would be insufficient attractions and places to visit if taking a lengthier stay in the region. For other participants, these 'hidden gems' were themselves a significant attraction due to the peace and tranquillity offered. In comparison to the strength and recognition of brands such as Visit Wales, the North's tourism offer was not as easily identified by participants. Residents living in some of the North's most popular beauty spots held conflicting views on the North's visitor economy, identifying the benefits it brings to local businesses, but equally expressing concerns regarding the impacts of large volumes of visitors on often small, isolated villages.

Stakeholders from the North's destination management organisations identified a number of operational challenges which have arisen following the Covid-19 pandemic and the increase in domestic tourism. Previously quiet locations have begun to receive large volumes of visitors, leading to infrastructure and car parks becoming overwhelmed by strong demand. Many of the North's rural visitor hotspots are now operating an 'attract and disperse' strategy in an attempt to spread demand across their region of influence, preventing key 'honeypots' from becoming overwhelmed. On the other hand, stakeholders identified train services which were previously utilised by business travellers but now had free capacity and could therefore instead be targeted at leisure travellers. Historic challenges surrounding collaboration and alignment of aims between the North's transport operators, destination management organisations, and local authorities, were identified as a key barrier to mounting a coordinated response to the challenges and opportunities facing the North's visitor economy. While collaboration with the North's train operating companies was felt to have improved as a result of the pandemic response, there was concern from some stakeholders that as organisations try to regain their market position, collaboration could give way to competition. Stakeholders welcomed engagement at a strategic level across the various organisations involved in the North's visitor economy, especially to help understand short term priorities as recovery gets underway, as there was recognition that taking the correct steps with transport will be key to long-term growth.

The North of England has a diverse, varied, and rich visitor offer, which has the potential to undergo a renaissance as previous leisure and holiday habits have been disrupted by the pandemic. For the North to take advantage of this trend, it will be necessary for the region to articulate its high-level visitor offer to wider audiences via a consistent brand, with the aim of reducing fragmentation and supplementing strong local brands with a consistent strategic narrative for external audiences. As part of the development of this supplementary brand, it will be essential for the North's transport operators, local transport authorities, and destination management organisations to closely collaborate to ensure the needs and expectations of visitors are met, and the recovery of the North's visitor economy is supported. Closer alignment between the North's transport operators and destination management organisations should be encouraged to help build back confidence in travel around the region, better facilitate the attraction of visitors, and collaboratively manage key destinations, with a view to encouraging larger visitor numbers to a greater number of destinations in the North, therefore sharing the benefits of tourism across a wider area.

9.3. Summary and Key Actions

Recommendation	Key actions	Geographic application	Implementation timeframe	Suggested delivery partners
Increased safety messaging and a communications campaign to support and encourage post-Covid travel on public transport	A unified pan-Northern communications, marketing and incentivisation campaign. This should reassure customers of the safety and efficiency of public transport, remind customers of the benefits of travelling by public transport, and incentivise the use of sustainable travel modes	Pan-Northern	1-6 month horizon, focusing on key periods of travel demand e.g. School Holidays and seasonal peaks	The North's transport operators and community rail partnerships, supported by TfN
	Messaging from senior politicians in support of public transport	Pan-Northern	1-6 month horizon	TfN, with support from local and central government
Provision of better-quality active travel facilities on public transport and at visitor economy hotspots	Improved facilities for active travel on public transport services to support active tourism across the North	Pan-Northern	1-3 year horizon	The North's LTAs, transport operators, rolling stock leasing companies (ROSCOS), supported by TfN
	Improved facilities for active travel at key visitor destinations	Pan-Northern, tailored to local requirements	1-3 year horizon	The North's LTAs, DMOs, and highway authorities, supported by TfN
	Widespread trial of micromobility offerings at suitable visitor destinations to complement active modes	Locally tailored offer at key destinations	1-3 year horizon	The North's LTAs, DMOs, and highway authorities, supported by TfN
Promotion and development of ticket offers and packages	Raise awareness of existing leisure orientated ticket products (e.g. rover tickets, BritRail) through marketing channels and links to visitor attractions served by public transport services	Pan-Northern	1-6 month horizon	The North's transport operators, destination management organisations (DMOs), and community rail partnerships, supported by TfN
	Ensure leisure orientated ticketing products can be easily purchased through popular sales channels such as mobile apps and ticket machines	Pan-Northern	12 month horizon	The North's transport operators and the Rail Delivery Group, supported by TfN

Recommendation	Key actions	Geographic application	Implementation timeframe	Suggested delivery partners
	Wider knowledge and availability of ticketing products which combine travel with admission to visitor attractions to facilitate easier and more competitively priced visits to the North	Pan-Northern	1-3 year horizon	The North's transport operators and DMOs, supported by TfN
	Availability of ticketing products which combine travel with accommodation to facilitate easier and more competitively priced visits to the North	Pan-Northern	3-5+ year horizon	Central Government, supported by TfN, the North's transport operators, and DMOs
	Multi-modal ticketing to facilitate frictionless journeys across multiple modes	Pan-Northern	3-5+ year horizon	Central Government, supported by TfN, the North's transport operators
More reliable and joined up services that reduce journey times, changes between services, and uncertainty for visitors	Introduction of seasonal excursions and leisure orientated public transport services to popular destinations, aiming for door-to-door convenience where possible	Key visitor flows within the North	1-3 year horizon	The North's transport operators, DMOs, and Confederation of Passenger Transport (CPT), supported by TfN
	Improve connectivity by providing more through services between visitor hotspots and large centres of population	Pan-Northern	3-5+ year horizon	The North's transport operators, local transport authorities (LTAs), Network Rail, supported by TfN
Facilitate easier visitor journeys to and within the North, via customer-centric information, infrastructure and services	Market public transport as an experience and mode of choice to visitors to the North through the promotion of scenic routes and creation of car free itineraries	Pan-Northern, focusing on popular destinations or flows where public transport use is low	12 month horizon	The North's transport operators, community rail partnerships, and DMOs, supported by TfN
	Provide enhanced signposting of attractions and beauty spots using 'brown tourist signs' and urban wayfinding schemes	Visitor hotspots within the North	12 month horizon	The North's highways authorities and DMOs
	Creation of tailored onward mobility hubs at gateways to key leisure destinations	Locally tailored offer at key gateways to the North's visitor hotspots	3-5 year horizon	The North's LTAs, Network Rail, CPT, transport operators and DMOs, supported by TfN

Recommendation	Key actions	Geographic application	Implementation timeframe	Suggested delivery partners
Develop an accessible and inclusive visitor economy	Marketing and communications tailored to the needs and concerns of less able and marginalised groups to directly target barriers to returning to public transport	Pan-Northern	12 month horizon	The North's transport operators and community rail partnerships, supported by TfN
	Enhanced customer service and journey assistance to facilitate door-to-door public transport journeys	Pan-Northern	1-3 year horizon	The North's transport operators, community rail partnerships, and CPT, supported by TfN
	Use of inclusive design principles as part of the development of new transport infrastructure and services	Pan-Northern	1-3 year horizon	TfN and the North's LTAs and highway authorities
	Development of public transport services and fares which respect diverse socio-economic contexts ensuring equality of access to the North	Pan-Northern	1-3 year horizon	The North's transport operators, local transport authorities, and community rail partnerships, supported by TfN
A more joined up approach across the North to better market the region and manage transport demand	Closer coordination between destinations, attractions and transport operators to more actively and effectively manage demand on key transport routes and at key destinations	Pan-Northern	12 month horizon	The North's DMOs, transport operators, and leisure operators, supported by TfN
	Closer collaboration between DMOs to externally market the North with one voice, ensuring visitors can access information on the region from one source, while maintaining the strength and recognition of existing well-known destination brands	Pan-Northern	1-3 year horizon	The North's DMOs, supported by TfN
	Improved data sharing between key organisations to support improved planning and better customer insight	Pan-Northern	1-3 year horizon	The North's DMOs, transport operators, and leisure operators, supported by TfN

10. Next Steps

This study has developed a profile of the North's visitor economy and its sub-sectors, highlighting the key features of the visitor economy as well as its importance and value in different types of places. The transport demand generated by the visitor economy has been examined to understand how different types of visitors travel to and within the region, and the extent to which the North's current and proposed transport infrastructure and services will support the continued success of the visitor economy. Finally, this study has gathered the views of residents and stakeholders to understand their experiences of transport and the visitor economy.

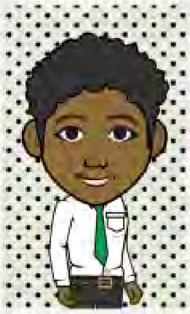
This evidence has been used to develop recommendations to support the recovery and growth of the visitor economy over the coming years. The recommendations made by this study have been designed to provide TfN and their partners with a cross-cutting set of recommendations, relevant to multiple transport modes, to be considered for implementation over the 12 month, 1 – 3 year, and 3 – 5+ year horizons. As part of the socialisation, consideration and implementation of the study recommendations, the following next steps are recommended:

- Presentation of study findings and recommendations to TfN's partners and stakeholders to secure their buy-in.
- Presentation of study findings and recommendations throughout TfN to ensure the importance of the visitor economy is recognised throughout TfN's workstreams.
- Explore opportunities to convene a visitor economy forum, through which the findings and recommendations of this study can be discussed, and ownership of actions identified.
- Work with central government on the delivery of recommendations made by the DfT's Williams-Shapps Plan for Rail, National Bus Strategy for England, Transport Decarbonisation Plan, and DCMS Tourism Recovery Plan.
- Development of action plans, in collaboration with key partners and stakeholders, to identify opportunities and actions for implementation, focusing on rail in the first instance.

Appendices

Appendix A.

A.1. TfGM Covid Travel Personas 2020/2021



PT averse car commuter

- Supermarket Keyworker
- Late 20s
- Everyday commuter car trips replacing bus due to Covid
- One car household

"I don't like the idea of getting on a bus or the tram these days, I drive in every day now and have found a nice parking space I can use all day….I've been using Uber a lot more too as I feel safer in a Taxi."

Attitude to public transport	Attitude to active travel	More active travel since Covid	Fewer car journeys since Covid	Has travelled less since Covid	Will keep their new routine after Covid
😐	🙂	🙂	✗	✗	😐

Persona summary: This persona represents those who live outside the city centre who made daily commutes using multiple public transport (PT) modes pre-Covid and who used their car only for social trips, but who have been extremely put off using PT since the start of the pandemic, due to safety concerns. (They have not used PT since the pandemic and have a perception this would be unsafe.) This persona has switched to driving into work everyday and using taxis for all their supplementary journeys. They also increased their active travel during the summer months of the pandemic and enjoyed cycling into work, but they are very 'fair weather' cyclists, and have stopped cycling altogether in the autumn/winter months. They do feel this new routine is more 'lazy' and that they were more active using PT, so they plan to go back to PT journeys for their commute once the pandemic is over. However, they have enjoyed the convenience of car and on-demand taxi services (for work trips) as their predominant modes of transport and will likely use these more than they did pre-Covid.

Key Takeaways: **This persona has swapped public transport for the private car since the first lockdown, this habit may be hard to break once Covid subsides, with implications for PT revenues. Parking could be reduced in city centre after the pandemic to ensure switching from PT to private car is not a long term behaviour.**

Cycling cynic to evangelist

- Property Analyst
- Early 20s
- Less frequent commuting and limited social trips
- One car household

"I wasn't too keen on cyclists pre-Covid, they were annoying. Now it's a completely different attitude, I don't wear lycra yet but cycling has helped my understanding of cycling issues!"

Attitude to public transport	Attitude to active travel	More active travel since Covid	Fewer car journeys since Covid	Has travelled less since Covid	Will keep their new routine after Covid
😐	🙂	🙂	✓	✓	😐

Persona summary: This persona represents those who live close enough to the city centre/their workplace to switch from a bus/car commute to a short cycle commute. They have made this swap since the first lockdown, despite being cynical about cyclists and cycling pre-Covid and having never cycled regularly before, as they continued to need to commute into a place of work several times a week. They have been pleasantly surprised how easy the journey is, especially with the new social distancing cycling measures (for example on Deansgate in the city centre). They have made cycling their primary transport mode and only use their car if they have a heavy load or the weather is very poor. They have become a cycling evangelist and now work to promote cycling and want more active travel provisions in Greater Manchester. They own a car but are hardly using it since Covid. They resent paying for their car and would like to give it up but believe this would be a waste of the investment they have made. They try to avoid public transport journeys due to concerns about Covid and have not used a bus since lockdown one.

Key Takeaways: **Happy to switch from driving/bus riding to cycling once they tried this out and want to maintain this routine. Could provide evidence that financial incentives will be needed to encourage even avid cyclists to give up their cars (eg a re-introduction of the car scrappage scheme or mobility credits).**

PT positive to active travel convert

- NHS Manager (Keyworker)
- Late 50s
- Everyday commuter
- One car household

"I've really enjoyed giving up one of my two bus journeys and walking instead. I like my commute now! And it's good for me and safer."

Attitude to Public transport	Attitude to active travel	More active travel since Covid	Fewer car journeys since Covid	Has travelled less since Covid overall	Will keep their new routine after Covid
😊	😊	😊	✓	✓	😐

Persona summary: This persona represents those who live outside the city centre and relied on public transport (PT) for their commute pre-Covid, as well as other journeys such as local shopping and the school run. Since Covid this persona has been put off travelling on PT due to health concerns, and has reduced PT travel to essential journeys only, and switched to walking as a significant part of their commute, as well as other leisure journeys. They take the health measures related to Covid very seriously as they are a keyworker, and have been travelling much less since the pandemic and not seeing any friends/family outside their household bubble. Their household has one other car (2 adults and 2 children) used for a significant amount of evening & weekend trips pre-Covid, but used far less now. They expect to begin making more car trips again for hobbies/social activities once the pandemic ends but will continue their walking routine.

Key Takeaways: Avoiding PT unless necessary and introduced active travel as part of their commute since Covid. Will continue with this routine but this may be offset with more car journeys (as a passenger) once the pandemic is over. Implications for PT revenues but this persona could contribute to clean air zone targets.

Active travel averse Homeworker

- Professional services Manager
- Early 40s
- Daily commuter journeys replaced with homeworking
- Two car household

"I've been working from home mostly since March. I'll stick with 50/50 home and office work once the pandemic ends."
"I would love to be able to lose one of our cars but I can't see a point where the cost benefit will outweigh not owning two."

Attitude to public transport	Attitude to active travel	More active travel since Covid	Fewer car journeys since Covid	Has travelled less overall since Covid	Will keep their new routine after Covid
☹	☹	😐	✓	✓	😐

Persona summary: This persona represents those who live outside the city centre of Manchester and relied on a mix of private car and public transport (PT) for their daily commute pre-Covid. They moved almost exclusively to homeworking since the first lockdown from commuting to the office pre-Covid. They still commute into the office/to meetings once in a while and prefer to do this on public transport as they like how quiet the services are compared to the poor experience of crowding and delays pre-Covid. They avoid other unnecessary PT journeys but felt safe once they tried out train services since the pandemic. They have two cars in a household of two adults and one child and would like to give up one car but are not confident enough in the reliability and integration of PT services post-Covid. They still use their car at least once a day for shopping and to get to nice walking spots (recreation) but have been using their car less than pre-Covid. They would not feel safe cycling to work despite some new Covid infrastructure. They have a generally sceptical view of PT services not giving value for money. They want to continue working from home more than Pre-Covid in the long term so would not consider buying a season ticket once the pandemic recedes.

Key Takeaways: **Shows more flexible PT fares will be needed to encourage majority homeworkers back, and more needs to be done to promote safe and attractive cycling options for those who have negative perceptions. Also demonstrates how even those who have moved to homeworking will continue to want to make some trips to combat social isolation, so travel will not stop du to this societal shift, but the reasons for journeys may change in the future.**

PT reliant with complex needs

- Administrator with invisible disabilities
- Mid 30s
- Frequent off peak journeys
- No car household

"I'm sorry for others but Covid has been great for me, the extra space on buses means I'm less anxious about my disabilities and know I'll get a seat, and I've found a new homeworking job."

Attitude to public transport	Attitude to active travel	More active travel since Covid	Fewer car journeys since Covid	Has travelled less since Covid	Will keep their new routine after Covid
☺	☺	☺	✗	✗	☺

Persona summary: This persona represents those with physical disabilities and mental health conditions (complex needs), who do not drive/have access to a private car and whose travel in GM depends on their conditions day to day, therefore it is important they plan their journeys in advance. Covid and the rise of homeworking has made it easier for this persona to access employment opportunities where physical presence (and hence daily travel) isn't a requirement. They have enjoyed the quiet bus services since Covid and rely on the bus for most of their journeys. They also cycle and walk and enjoy these activities when they are having a 'good day' and are able to cycle/walk. They were frustrated pre-Covid at the abuse of disabled seats and the crowding of PT services, and have felt more comfortable and less judged travelling on PT since Covid as there are distancing measures in place. This persona relies on support networks for access to flexible travel such as lifts from friends and family, and has continued to need to make some journeys in friend's cars or taxis for essential activities such as shopping, hospital appointments and to support a family member which has not changed since the start of the pandemic. The price deters this persona for using the metro very often and they tend to rely on the travel included in a disability bus pass.

Key Takeaways: **Reduced passenger numbers on PT services has been positive for those with disabilities/complex needs who rely on these services whether a pandemic is here or not. There is a desire for more provision for those with invisible disabilities on PT. This persona demonstrates that personalised journey planner tools that show demand on buses and the Metrolink could be very useful to travellers with disabilities, to allow them to have more control over their journeys.**

Car and PT reliant to regular walker

- Retired
- Mid 70s
- Frequent local recreational trips
- One car household

"I think I'll walk even more when the pandemic is over and I'll keep walking instead of using my car. I don't feel very safe on public transport but will go back to [using] the tram quite often too when the virus is gone."

Attitude to public transport	Attitude to active travel	More active travel since Covid	Fewer car journeys since Covid	Has travelled less since Covid	Will keep their new routine after Covid
☺	☺	☺	✓	✗	☺

Persona summary: This persona represents those who relied on a mix of car and public transport journeys before the Covid pandemic, but have changed their travel habits since the first lockdown ended by avoiding public transport and switching to walking rather than driving. This change is due to not feeling safe on public transport, particularly for older age groups, and also in order to keep healthy, which has become more of a priority since the pandemic. The trips this persona makes are mostly essential shopping and leisure trips, and they have maintained the same number of trips since pre-Covid in order to maintain an active lifestyle and ensure they are not isolated. They have also been avoiding taxi journeys as they also see these as unsafe. They intend to maintain their new routine of increased walking journeys for local and longer trips after the pandemic and only use the car when necessary for carrying a load, but they want to get back to using public transport when the pandemic ends, as they have a positive experience of bus and tram services in GM and enjoy concessionary fares.

Key Takeaways: **Has enjoyed switching from driving to walking to local journeys and more long distance journeys due to Covid and will continue this routine. Less opportunity for MaaS to benefit this persona, as they use concessionary pass and make mostly local active travel journeys which is likely to continue post-Covid.**

Appendix B.

B.1. Breakdown of the weightings assigned to each sub sector of the visitor economy

Using professional judgment, knowledge and experience, high level percentages have been assigned to each SIC code to indicate the share of the SIC that is attributable to the visitor economy. As explained in section 3.1, air travel and retail have been excluded from the centra analysis.

5 digit SIC	Potential share - scenario 2 - lower	Potential share - scenario 3 - upper
49320 : Taxi operation	0%	50%
50100 : Sea and coastal passenger water transport	100%	100%
50300 : Inland passenger water transport	50%	100%
55100 : Hotels and similar accommodation	100%	100%
55201 : Holiday centres and villages	100%	100%
55202 : Youth hostels	100%	100%
55209 : Other holiday and other short-stay accommodation (not including holiday centres and villages or youth hostels)	100%	100%
55300 : Camping grounds, recreational vehicle parks and trailer parks	100%	100%
55900 : Other accommodation	100%	100%
56101 : Licensed restaurants	50%	100%
56102 : Unlicensed restaurants and cafes	50%	100%
56103 : Take away food shops and mobile food stands	0%	50%
56210 : Event catering activities	0%	50%
56290 : Other food service activities	0%	50%
56301 : Licensed clubs	50%	100%
56302 : Public houses and bars	50%	100%
68202 : Letting and operating of conference and exhibition centres	50%	100%
77110 : Renting and leasing of cars and light motor vehicles	0%	50%
77210 : Renting and leasing of recreational and sports goods	0%	50%
79110 : Travel agency activities	100%	100%
79120 : Tour operator activities	100%	100%
79901 : Activities of tourist guides	100%	100%
79909 : Other reservation service activities (not including activities of tourist guides)	100%	100%
82301 : Activities of exhibition and fair organizers	100%	100%
82302 : Activities of conference organizers	50%	100%
90010 : Performing arts	50%	100%
90020 : Support activities to performing arts	50%	50%

90030 : Artistic creation	50%	50%
90040 : Operation of arts facilities	100%	100%
91020 : Museum activities	100%	100%
91030 : Operation of historical sites and buildings and similar visitor attractions	100%	100%
91040 : Botanical and zoological gardens and nature reserve activities	100%	100%
92000 : Gambling and betting activities	0%	50%
93110 : Operation of sports facilities	100%	100%
93120 : Activities of sport clubs	0%	0%
93130 : Fitness facilities	0%	0%
93199 : Other sports activities (not including activities of racehorse owners)	50%	100%
93210 : Activities of amusement parks and theme parks	100%	100%

B.2. The North's Visitor Economy Assets

Paid attractions (>200,000 visitors per year)		***Free attractions (>200,000 visitors per year)***		***Other significant attractions, without published attendance figures***	
Number on map	**Attraction**	**Number on map**	**Attraction**	**Number on map**	**Attraction**
1	Beamish - The Living Museum of the North	24	Bolton Museum, Aquarium and Archive	51	Blackpool Pleasure Beach
2	The Beatles Story	25	Customs and Excise National Museum	52	Blackpool Tower
3	Castle Howard	26	Discovery Museum	53	Blackpool Zoo
4	Chatsworth	27	Durham Cathedral	54	Chill Factore
5	Chester Zoo	28	Great North Museum: Hancock	55	East Lancs Railway
6	Cragside House, Gardens and Estate	29	The Ice Cream Farm	56	Fantasy Island
7	Dunham Massey Hall	30	Imperial War Museum North	57	Flamingo Land
8	Fountains Abbey	31	International Slavery Museum	58	JORVIK Viking Centre
9	Gibside	32	Lady Lever Art Gallery	59	Knowsley Safari Park
10	Harewood House Trust	33	Leeds Art Gallery	60	Life Science Centre
11	Lotherton Hall & Gardens	34	Leeds City Museum	61	Lightwater Valley Theme Park
12	Quarry Bank Mill and Garden	35	Manchester Art Gallery	62	Magna Science Adventure Centre

13	Ravenglass & Eskdale Railway Co Ltd	36	Manchester Museum	63	North Yorkshire Moors Railway
14	RHS Garden Harlow Carr	37	Merseyside Maritime Museum	64	SEA LIFE Blackpool
15	Sandcastle Waterpark	38	Museum of Liverpool	65	South Lakes Safari Zoo
16	Scarborough Cliff Railway	39	Museums Sheffield: Millennium Gallery	66	The Deep
17	Speke Hall, Gardens & Estate	40	Museums Sheffield: Weston Park	67	Xscape
18	Tatton Park	41	National Glass Center		
19	Ullswater Steamers	42	National Railway Museum		
20	Wallington House, Gardens & Estate	43	National Science and Media Museum		
21	Windermere Lake Cruises, Bowness	44	Royal Armories Museum		
22	York Minister	45	Science and Industry Museum		
23	Yorkshire Wildlife Park	46	Sunderland Museum and Winter Gardens		
		47	Tate Liverpool		
		48	Walker Art Gallery		
		49	Whitworth Art Gallery		
		50	World Museum Liverpool		

Source: Visit Britain Annual Survey of Visits to Visitor Attractions, 2019; additional attractions identified by desktop research and stakeholder feedback

National Parks	Areas of Outstanding Natural Beauty	UNESCO World Heritage Sites
Lake District	Arnside & Silverdale	Derwent Valley Mills
North York Moors	Forest of Bowland	Durham Castle and Cathedral
Northumberland	Howardian Hills	Hadrian's Wall
Peak District	Nidderdale	Jodrell Bank Observatory
Yorkshire Dales	North Pennines	Liverpool – Maritime Mercantile City*
	Northumberland Coast	Saltaire
	Solway Coast	Studley Royal Park
		The English Lake District

** At the time of this study (January – July 2021), Liverpool – Maritime Mercantile City remained designated as a UNESCO World Heritage Site*

B.3. Supply side

B.3.1. Top 20 local authorities with highest number of businesses in the visitor economy sector

Rank	Local Authority	Top 20 Districts in the North with the highest visitor businesses 2019
1	Leeds	1800
2	Manchester	1710
3	Sheffield	1280
4	Liverpool	1270
5	County Durham	1200
6	Cheshire East	1200
7	Bradford	1150
8	Northumberland	1080
9	Kirklees	1020
10	East Riding of Yorkshire	1000
11	Newcastle upon Tyne	870
12	Cheshire West and Chester	860
13	South Lakeland	790
14	Wakefield	730
15	York	720
16	Scarborough	690
17	Stockport	680
18	Calderdale	650
19	Wirral	630
20	Harrogate	600

Source: Nomis, Business count, 2019

B.3.2. Number of businesses in the North's visitor economy by region and broad industrial group

	North East	North West	Yorkshire and The Humber	North of England
Land transport	120	330	200	660
Water transport	10	10	10	30
Accommodation	450	1,690	1,140	3,440
Food and beverage	4,650	12,220	9,820	27,400
Real estate activities	10	20	20	50
Rental and leasing activities	50	260	170	480
Travel agency, tour operator e.t.c	130	700	470	1,320
Office administrative	30	200	190	430
Creative, arts and entertainment	290	1,190	830	2,360
Cultural activities (Libraries, archives, museums)	20	80	80	190
Gambling and betting	30	50	40	130
Sports, amusement and recreation	350	1,100	840	2,350
Total	6,100	17,800	13,800	38,800

Source: Nomis, Business count, 2019

B.3.3. Top 20 local authorities in the North with the highest employment in the visitor sector

Rank	Local Authority	Top 20 local authorities in the North with the highest visitor employment 2019
1	Manchester	41,400
2	Leeds	31,200
3	Liverpool	28,900
4	Newcastle upon Tyne	19,900
5	Sheffield	19,300
6	Cheshire West and Chester	17,700
7	Cheshire East	17,000
8	County Durham	15,200
9	York	12,900
10	Northumberland	12,800
11	Bradford	12,500
12	South Lakeland	12,000
13	East Riding of Yorkshire	10,700
14	Kirklees	10,600
15	Trafford	10,300
16	Blackpool	10,000
17	Harrogate	9,800
18	Salford	9,100
19	Wakefield	8,800
20	Warrington	8,700

B.3.4. Employment in the visitor economy by region in the North and broad industrial group

	North East	North West	Yorkshire and The Humber	North of England
Land transport	1,400	2,800	1,000	5,300
Water transport	-	500	200	700
Accommodation	10,700	53,200	25,200	92,000
Food and beverage	63,400	164,900	118,500	354,200
Real estate activities	-	600	1,100	1,900
Rental and leasing activities	1,400	3,400	1,700	6,500
Travel agency, tour operator e.t.c	2,200	11,700	4,200	18,300
Office administrative	200	1,100	700	2,100
Creative, arts and entertainment	1,900	12,300	5,300	19,600
Cultural activities (Libraries, archives, museums)	2,300	5,300	5,500	14,100
Gambling and betting	2,100	5,600	3,700	11,500
Sports, amusement and recreation	7,700	24,600	16,600	52,700
Total	93,000	286,000	184,000	579,000

Source: Nomis, BRES, 2019

B.3.5. Supply of accommodation by local Authority in the North, 2019

Rank	Local Authority *	Top 20 Districts in the North with the most Accommodation in 2019
1	South Lakeland	6,645
2	Allerdale	3,043
3	Northumberland	2,863
4	Blackpool	2,628
5	Scarborough	2,450
6	Derbyshire Dales	2,444
7	Eden	1,914
8	Richmondshire	1,361
9	Ryedale	1,194
10	Harrogate	1,154
11	High Peak	1,140
12	East Riding of Yorkshire	1,136
13	Craven	960
14	County Durham	815
15	York	771
16	Cheshire West and Chester	597
17	Hambleton	587
18	Lancaster	543
19	Copeland	503
20	Carlisle	486

Source: Total Accommodation Stock, Visit Britain Great Britain tourism survey, 2016

**Figures may not sum exactly as a result of rounding*

**Figures for the North of England total also include data on the midlands which represents the section of the Peak District that falls outside of the North of England*

B.4. Demand side

B.4.1. Domestic day visits to local authorities across the North

Rank	local authorities	Top 20 local authorities in the North with the most domestic day visits (2019)
1	Manchester	29,665,000
2	Leeds	22,708,000
3	Liverpool	14,352,000
4	Sheffield	13,796,000
5	Newcastle upon Tyne	12,562,000
6	Cheshire West and Chester	12,363,000
7	Northumberland	11,374,000
8	County Durham	11,142,000
9	Cheshire East	9,210,000
10	Scarborough	9,130,000
11	York	9,090,000
12	East Riding of Yorkshire	8,680,000
13	Blackpool	8,111,000
14	Kirklees	7,823,000
15	Bradford	7,678,000
16	South Lakeland	7,609,000
17	Doncaster	7,096,000
18	Wakefield	6,969,000
19	Derbyshire Dales	6,886,000
20	Stockport	5,836,000

Source: Visit Britain, GBTS Domestic day tourism by residents of Great Britain, 2019

B.4.2. Domestic overnight visits to local authorities across the North

Rank	Local Authority	Top 20 Local Authority in the North with the most visits in 2019
1	Manchester	2,669,000
2	Liverpool	1,672,000
3	Leeds	1,504,000
4	South Lakeland	1,459,000
5	York	1,424,000
6	Scarborough	1,365,000
7	Newcastle upon Tyne	1,252,000
8	Northumberland	1,233,000
9	Blackpool	1,137,000
10	Cheshire West and Chester	925,000
11	Sheffield	870,000
12	Allerdale	837,000
13	County Durham	670,000
14	East Riding of Yorkshire	653,000
15	Harrogate	601,000
16	Derbyshire Dales	579,000
17	Craven	560,000
18	Eden	474,000
19	Cheshire East	472,000
20	Lancaster	467,000

Source: Visit Britain, GBTS Domestic overnight tourism by residents of Great Britain, 2019

B.4.3. International overnight visits to local authorities across the North

Rank	Town	Top 20 Districts in the North with the most international overnight visits (2019)
1	Manchester	1,661,292
2	Liverpool	844,556
3	Leeds	337,813
4	York	297,340
5	Newcastle-upon-Tyne	281,783
6	Cheshire Other / DK towns	244,320
7	Manchester Other / DK towns	235,920
8	Sheffield	177,102
9	West Yorkshire Other / DK towns	108,339
10	Chester	94,917
11	Lancashire Other / DK towns	91,431
12	Doncaster	86,699
13	Harrogate	72,863
14	Merseyside Other / DK Towns	67,742
15	Bradford	65,638
16	Hull & Kingston-upon-Hull	58,452
17	Durham CO	58,445
18	Lancaster	58,006
19	Preston	44,881
20	Blackpool	42,353

Source: Visit Britain, IPS inbound (international) overnight tourism, 2019

B.4.4. Top 20 local authorities in the North to receive the highest total visits

Rank	Local Authority	Top 20 local authorities in the North to receive the highest total visits (2019)
1	Manchester	34,139,000
2	Leeds	24,634,000
3	Liverpool	17,016,000
4	Sheffield	14,874,000
5	Newcastle upon Tyne	14,135,000
6	Cheshire West and Chester	13,457,000
7	Northumberland	12,654,000
8	County Durham	11,873,000
9	York	10,940,000
10	Scarborough	10,605,000
11	Cheshire East	9,682,000
12	Blackpool	9,337,000
13	East Riding of Yorkshire	9,337,000
14	South Lakeland	9,140,000
15	Kirklees	8,152,000
16	Bradford	8,055,000
17	Doncaster	7,487,000
18	Derbyshire Dales	7,470,000
19	Wakefield	7,169,000
20	Harrogate	6,486,000

Source: Visit Britain, IPS inbound (international) overnight tourism, 2019

Source: Visit Britain, GBTS Domestic overnight tourism by residents of Great Britain, 2019

B.4.5. Other Visitor Definition

IPS identifies a long list of candidates for the category of 'Other':

- o Looking for work
- o Au pair
- o Shopping
- o Join/accompany
- o Medical treatment
- o Overnight transit
- o To look for a place to live
- o Selling/buying a house (not for business)
- o To get married, even if travelling on a package
- o To bring a child to school
- o To renew a visa, permit
- o To fulfil conditions for retaining residence permit
- o To take an examination
- o Watching any event for pleasure (including a sporting event)
- o Work experience
- o To receive an honour
- o To do research for own interest, not as part of profession/job
- o To live in a religious community
- o To take part in a competition – not amateur sports player/arts performer
- o Voluntary work
- o Working holiday (if both work/business and holiday are considered main reasons)
- o Flight only trips
- o Attending graduation

B.4.6. Value of the visitor economy

Direct supply side GVA impacts of total visits by Local Authority (£) 2019

Rank	Local Authority	Top 20 LAs with the highest direct supply side GVA in the North
1	Manchester	788,525,000
2	Liverpool	458,953,000
3	Leeds	442,998,000
4	Cheshire West and Chester	319,164,000
5	Cheshire East	299,607,000
6	Newcastle upon Tyne	279,371,000
7	Sheffield	263,772,000
8	South Lakeland	231,214,000
9	County Durham	207,871,000
10	Trafford	206,859,000
11	York	204,839,000
12	Blackpool	180,367,000
13	Northumberland	180,305,000
14	Salford	171,756,000
15	Bradford	169,621,000
16	Warrington	165,568,000
17	Wigan	158,658,000
18	Stockport	154,713,000
19	Harrogate	149,313,000
20	Kirklees	145,913,000

Source: Atkins calculations, 2021, using Nomis, BRES employment data, 2019 and ONS GVA data, 2017
**presented in 2019 prices*

B.4.7. Direct demand side GVA impacts of total visits by Local Authority (£) 2019

Rank	Local Authority	Top 20 Districts in the North with the highest total demand side GVA in 2019 (£)
1	Manchester	1,419,211,000
2	Liverpool	710,601,000
3	Leeds	591,159,000
4	Newcastle upon Tyne	500,564,000
5	York	442,807,000
6	Cheshire West and Chester	415,256,000
7	Sheffield	353,616,000
8	Blackpool	343,208,000
9	South Lakeland	323,447,000
10	Northumberland	281,445,000
11	Scarborough	273,113,000
12	County Durham	215,937,000
13	Allerdale	184,745,000
14	East Riding of Yorkshire	177,465,000
15	Gateshead	144,346,000
16	Doncaster	143,447,000
17	Derbyshire Dales	141,640,000
18	Bradford	140,238,000
19	Bury	138,177,000
20	Harrogate	135,469,000

Source: Visit Britain, GBTS Domestic overnight and day tourism by residents of Great Britain, 2019

Source: Visit Britain, IPS inbound (international) overnight and day tourism, 2019

Appendix C.

C.1. National Rail Passenger Survey

Table C-1 - Rail Journeys by TOC and Purpose (All TOCs)

	Total	Commute		Business		Leisure	
TOC:	**Count**	**Count**	**%**	**Count**	**%**	**Count**	**%**
Avanti West Coast (formerly Virgin Trains)	38,285	3,446	9%	8,423	22%	26,417	69%
c2c	46,743	31,318	67%	2,805	6%	12,621	27%
Chiltern Railways	25,376	9,643	38%	6,344	25%	9,389	37%
Cross Country	38,829	5,824	15%	10,872	28%	22,133	57%
East Midlands Railway (formerly East Midlands Trains)	26,433	6,080	23%	7,401	28%	12,952	49%
Gatwick Express	11,680	1,770	15%	5,191	44%	4,720	40%
Grand Central	1,389	69	5%	389	28%	931	67%
Great Northern	43,247	22,921	53%	4,325	10%	16,001	37%
Great Western Railway	113,196	31,695	28%	22,639	20%	58,862	52%
Greater Anglia	85,961	37,862	44%	21,424	25%	26,675	31%
Heathrow Express	6,388	128	2%	3,130	49%	3,130	49%
Hull Trains	2,074	207	10%	933	45%	933	45%
London North Eastern Railway	21,800	1,962	9%	6,758	31%	13,080	60%
London Overground	187,800	113,882	61%	5,089	3%	68,829	37%
Merseyrail	43,828	18,846	43%	438	1%	24,544	56%
Northern Rail	103,627	39,378	38%	9,326	9%	54,922	53%
ScotRail	95,876	37,823	39%	12,617	13%	45,436	47%
South Western Railway	216,670	114,835	53%	32,500	15%	69,334	32%
Southeastern	163,597	78,527	48%	34,355	21%	50,715	31%
Southern	164,028	85,295	52%	14,763	9%	63,971	39%
TfL Rail	50,656	32,156	63%	2,589	5%	15,911	31%
Thameslink	170,652	90,446	53%	17,065	10%	63,141	37%
Trans Pennine Express	29,520	7,675	26%	3,838	13%	18,007	61%
Transport for Wales (formerly Arriva Trains Wales)	36,085	11,127	31%	3,685	10%	21,274	59%
West Midlands Trains	74,352	30,313	41%	9,710	13%	34,330	46%
TOTAL	**1,798,093**	**813,226**	**45%**	**246,610**	**14%**	**738,257**	**41%**
Aggregates:							
London and South East operators	*1,360,347*	*680,788*	*50%*	*181,929*	*13%*	*497,629*	*37%*
Long distance operators	*158,330*	*25,264*	*16%*	*38,614*	*24%*	*94,452*	*60%*
Regional operators	*279,416*	*107,174*	*38%*	*26,067*	*9%*	*146,176*	*52%*
TOTAL	**1,798,093**	**813,226**	**45%**	**246,610**	**14%**	**738,257**	**41%**

Source: Transport Focus, National Rail Passenger Survey, Spring 2019

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