

England's Northwest – Key Tourism Facts 2007

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Introduction

Tourism is a significant sector in the Northwest, contributing an estimated £13.6 billion of direct and indirect expenditure to the regional economy. The Northwest Regional Development Agency has strategic responsibility for sustainable tourism development and states as its vision for the region: "that within ten years, it offers our visitors real excellence and superb experiences, wherever they go, and has a thriving visitor economy that is second to none."

This Fact Sheet presents key data on the performance of the region as a visitor destination in 2007. It uses a number of sources including STEAM (Scarborough Tourism Economic Activity Model), UKTS (United Kingdom Tourism Survey), IPS (International Passenger Survey), and SVVA (Survey of Visits to Visitor Attractions).

An on-going programme of regional tourism research work is seeking to improve data robustness and develop a greater understanding of visitor markets and economic impact.

For further information, please see our website:
www.nwriu.co.uk/tourism/210.aspx

Or contact Lesley King, Tourism Research Manager, NWDA
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Tourism Volume and Value

- £13.6bn was generated by visitors within the Northwest region in 2007 – an increase of 4% over 2006.
- This supported approximately 215,000 full time equivalent jobs in the region.
- Staying visitors accounted for 11% of trips (approximately 31 million trips) and 39% (£5.35bn) spend.
- Day visitors accounted for 89% of trips and 61% of spend (nearly £8.3bn)

The following table shows tourism by sub-region from overnight and day visitors.

Sub-region	Tourism Revenue – overnight visitors		Tourism Revenue – day visitors		Tourism Revenue – Total	
	2007 (£m)	Share (%)	2007 (£m)	Share (%)	2007 (£m)	Share (%)
Cumbria	824	15	321	4	1,144	8
Cheshire	568	11	1,088	13	1,655	12
Lancashire and Blackpool	1,591	30	1,320	16	2,911	21
Gtr Manchester	1,709	32	3,888	47	5,597	41
Merseyside	659	12	1,661	20	2,320	17
Northwest	5,350		8,277		13,627	

Greater Manchester accounts for two fifths (41%) of regional tourism revenue - and a higher proportion of day visitor revenue (47%). This is a result of a number of factors – the concentration of serviced accommodation (and relatively high occupancies – see below), its relatively large population (driving staying with friends and relatives and day trips), and a higher than average spend per trip (for both day and staying visits).

Lancashire and Blackpool was the next most significant sub-region (21% of all revenue) – this was driven by its staying visitor market (which accounted for 30% of the regional total).

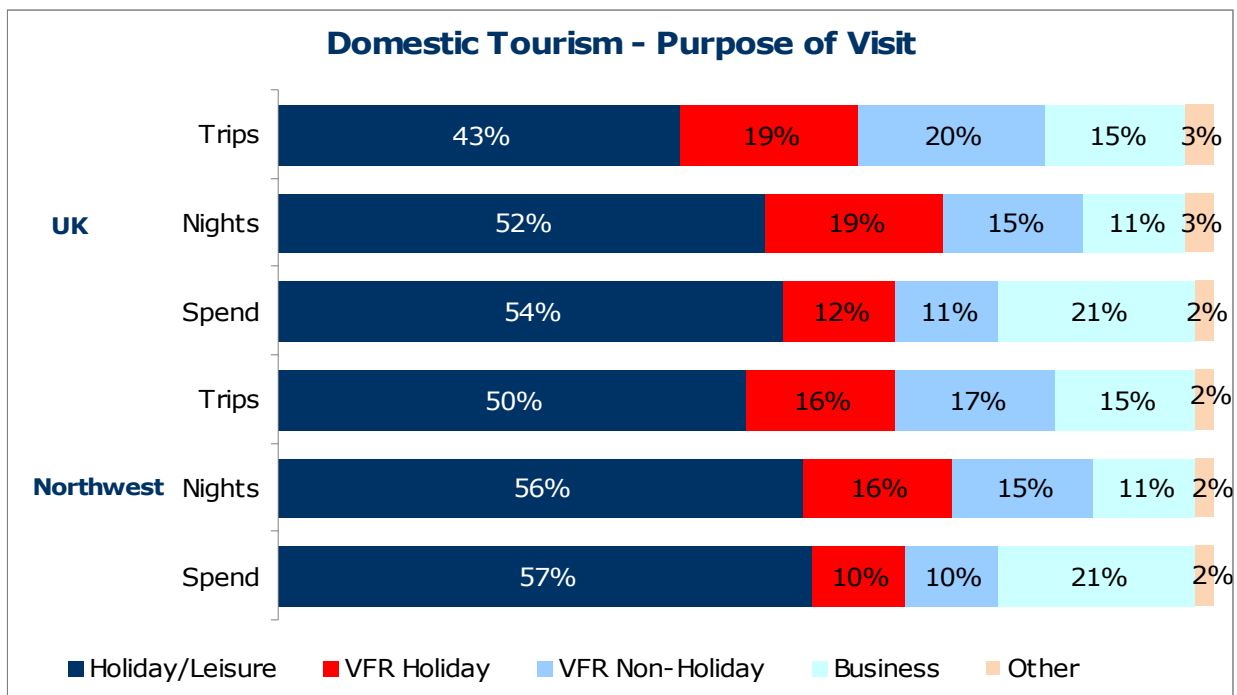
Cumbria, while relatively significant as an overnight destination (generating 15% of the region's staying expenditure) was less significant in day visitor terms (4%) – a product of its relatively low population and lack of major urban service centres. It should be noted that Cumbria's visitors would be likely to be more discretionary.

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Domestic Tourism

- The Northwest was the fourth most visited region in the UK after the South West, South East, and Scotland receiving 10.3% of all trips to destinations in the UK, and generating 10.8% of all spend.
- Holiday/leisure accounted for 50% of trips to the Northwest in 2007, and 57% in expenditure. Business tourism to the Northwest, despite accounting for a relatively low proportion of nights (11%), accounted for a significant part of expenditure (21%).
- Other than the Northwest itself, Yorkshire/Humberside was the most significant generating market for trips to the North West, and the South East generated the most spend.
- Per head of adult population, the highest spending markets for the Northwest were Northern Ireland, the Northwest itself, the North East, Yorkshire/Humberside, and Wales.
- In the Northwest, serviced accommodation was most commonly used – it accounted for 47% of trips and 60% of spend. Staying with friends and relatives accounted for 31% of trips but accounted for only 17% of spend.

The chart below compares purpose of visit to the Northwest with that of the UK as a whole.

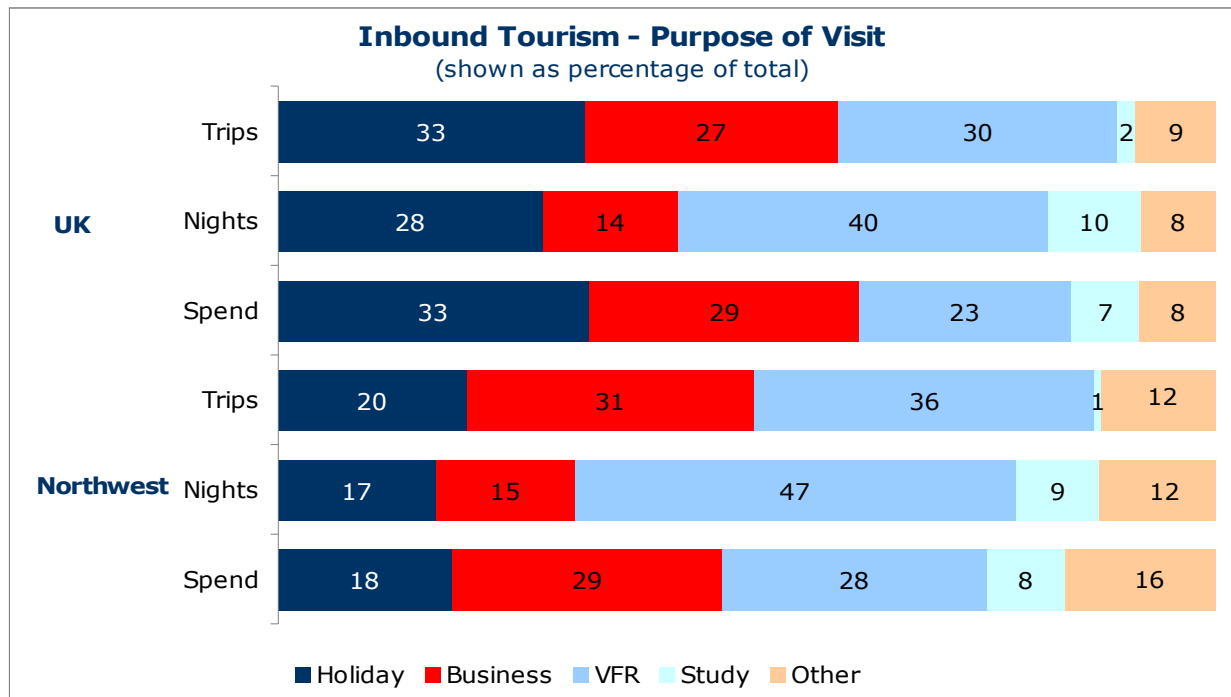


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Inbound Tourism

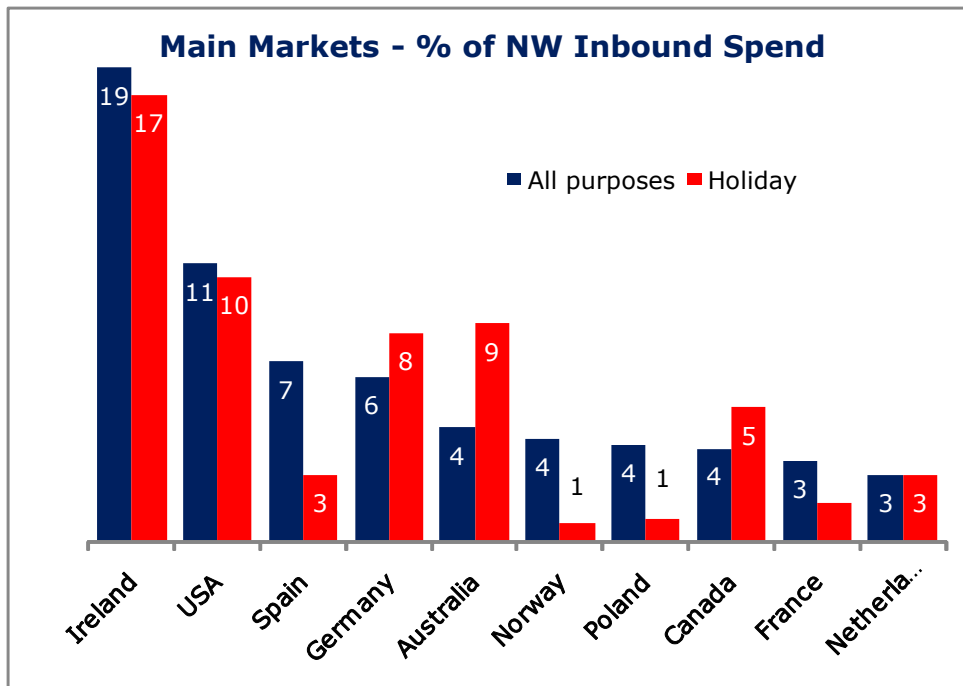
- In 2007, there were approximately 2.6m overseas trips to the Northwest – these generated a direct spend of £982m.
- The Northwest had a 7% share of UK inbound trips, 8% share of nights and 6% share of spend.
- It was the fourth largest UK region in terms of inbound tourism.
- Visiting friends and relatives (VFR) was the main purpose to visit the Northwest for inbound visitors – it accounted for 36% of trips in 2007.
- Inbound business tourism was worth slightly more to the Northwest (29% compared to 28% for VFR) despite accounting for a low proportion of nights (15%).
- Inbound holiday tourism was, in relative terms, less important to the Northwest than the UK as a whole.

The chart below compares purpose of visit to the Northwest with that of the UK as a whole.



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- The main inbound markets (in terms of spend) are Ireland, the US, Spain, Germany and Australia. These five markets account for 47% of inbound expenditure.
- Of the top 5 inbound holiday markets, the top 2 are Ireland and USA followed by Germany and Australia, with Spain a less significant market.



- Three quarters of visitors are arriving by air – they account for a higher proportion of spend (84%).
- Inbound tourism is slightly seasonal with a third quarter peak.

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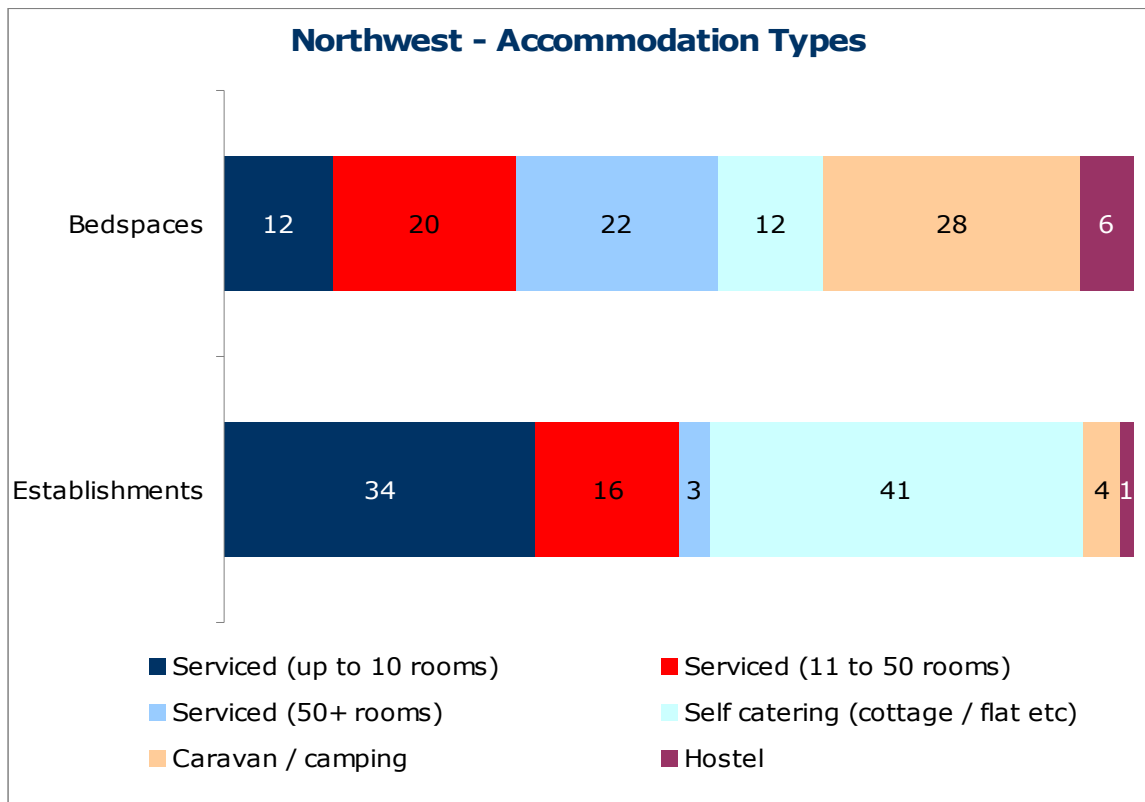
Accommodation

The region has approximately 10,000 accommodation establishments providing just over 336,000 bedspaces.

Just over half (53%) of the region's accommodation establishments are serviced – most of these have fewer than 10 bedrooms. Self catering cottages, flats and chalets account for most other establishments (41%).

The breakdown in terms of bedspaces differs slightly:

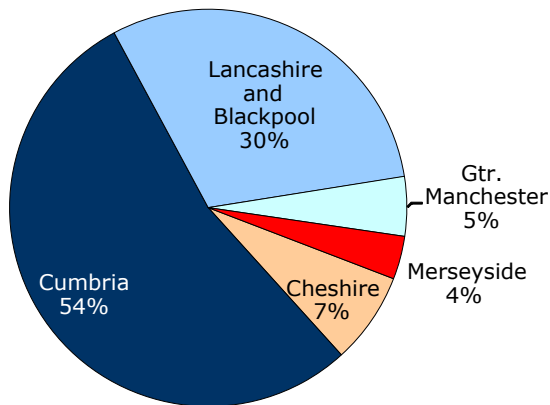
- The majority (54%) of the region's bedspaces are serviced.
- Smaller accommodation establishments (i.e. serviced with fewer than 10 rooms and self catering) while numerically significant are not so important in terms of bedspaces – they account for 75% of establishments but only 24% of bedspaces.
- The opposite is true for larger serviced (50+ rooms) and caravan / camping – they account for 7% of establishments but 50% of bedspaces.



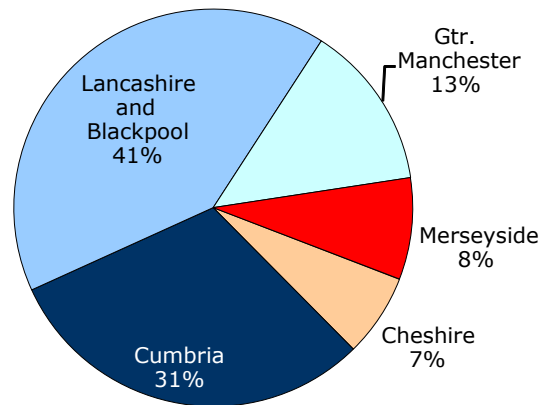
Sub-regionally the majority of establishments and bedspaces lie in Cumbria and Lancashire and Blackpool – together they account for 84% of establishments and 72% of bedspaces.

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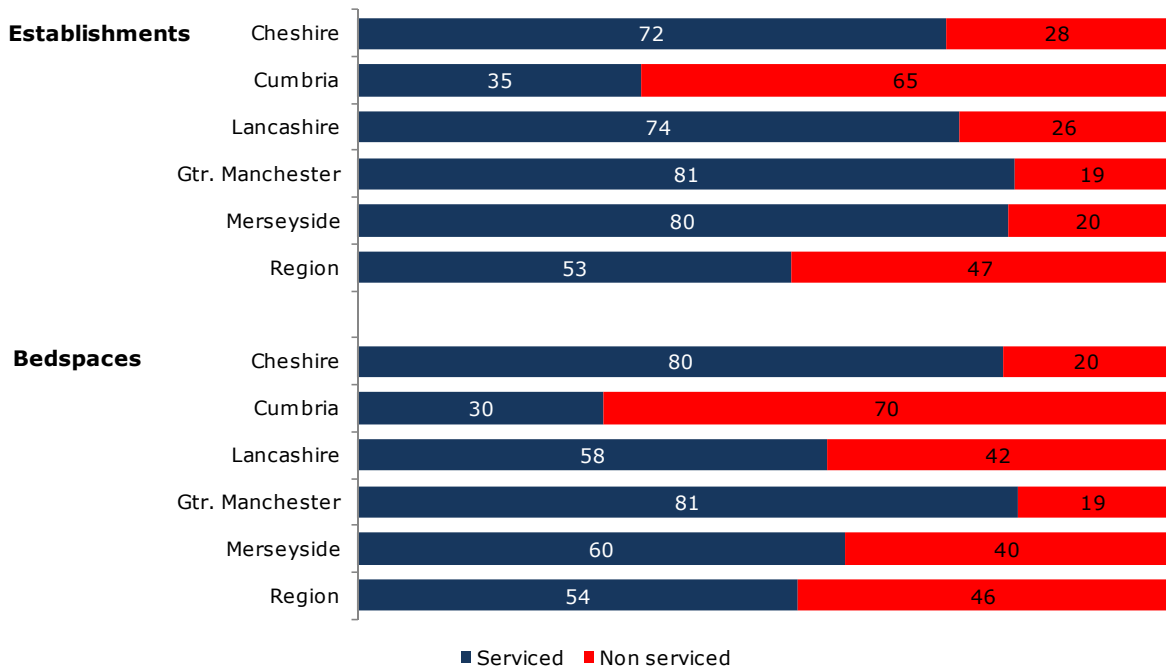
Northwest Accommodation - Establishments



Northwest Accommodation - Bedspaces



The make-up of sub-regional accommodation stock also varies. For example, Cumbria's supply is dominated by non-serviced accommodation – 78% of the region's self catering cottages / flats / chalets are in Cumbria. Greater Manchester, Cheshire and, to a lesser extent, Merseyside have a higher proportion of serviced establishments.



Source: Global Tourism Solutions 2006

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Serviced Accommodation Occupancy

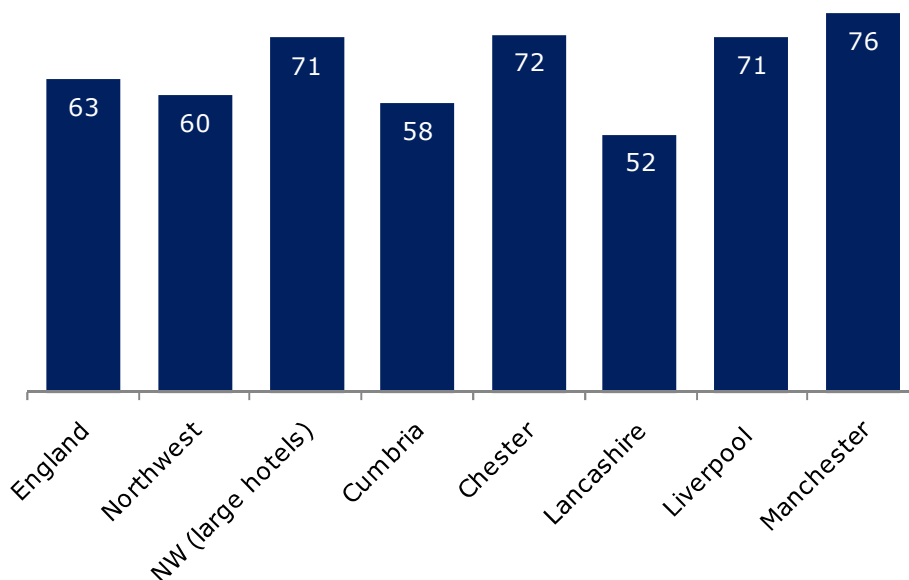
Occupancy data for the region has been collected from a number of different sources:

- LJ Forecaster for the cities of Manchester, Liverpool and Chester - predominantly large, city centre hotels with a high proportion of corporate business;
- STR Global reports for a sample of large hotels (typically 100+ rooms) in the Northwest;
- Cumbria Tourism Occupancy Survey for Cumbria serviced accommodation establishments - predominantly small & medium sized operators;
- England Occupancy Survey for England, Northwest and Lancashire serviced accommodation establishments - predominantly small & medium sized operators.

The chart below shows average annual occupancy rates for 2007. Occupancy rates in the region's three principal tourism cities (Liverpool, Chester and Manchester) were all above 70% room occupancy in 2007 – with Manchester's serviced accommodation achieving the highest average rates (76%). These high rates reflect the supply (and sampling) of larger hotels in these areas

Cumbria and Lancashire with a higher proportion of smaller establishments and, in relative terms, less corporate business had lower occupancy rates – 58% and 52% respectively

Serviced room occupancy (%) -2007

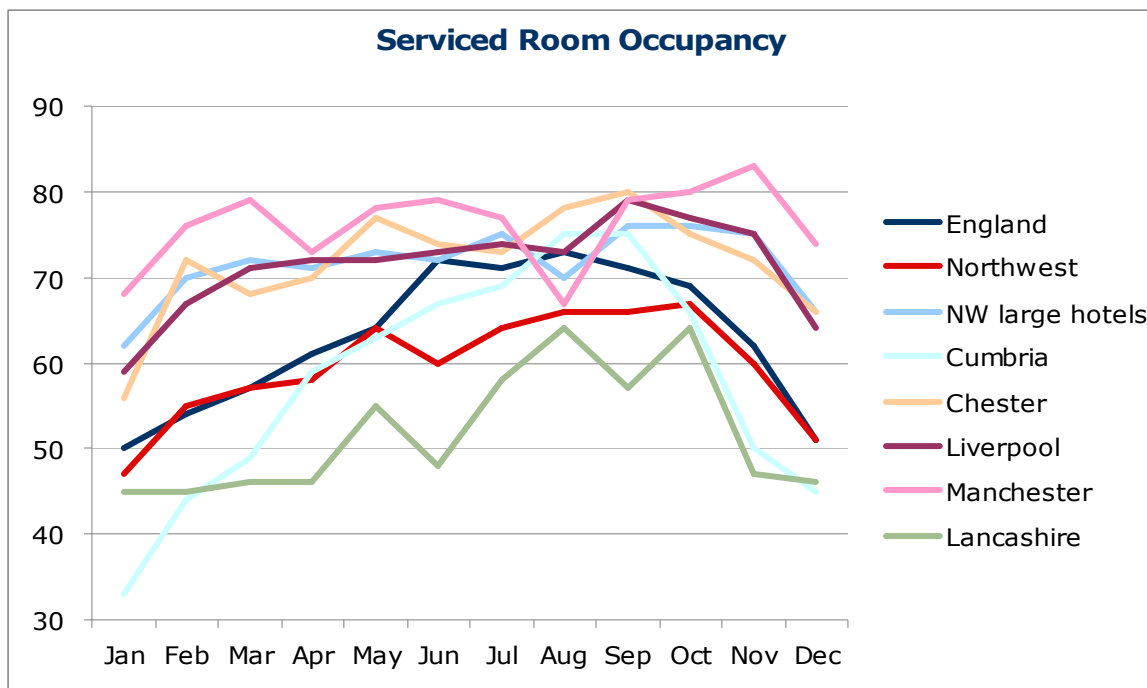


NB data relates to 2007 with the exception of the regional and Lancashire data which relates to 2008

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Patterns of serviced seasonality vary from area to area:

- The Northwest, like England as a whole, has a seasonal pattern with an August peak.
- Lancashire and Cumbria, reflecting their stronger holiday bases, are also more seasonal with strongly defined summer peaks.
- Larger hotels, Manchester, Liverpool and Chester are less seasonal – Manchester and, to a lesser extent Liverpool, have a pronounced downturn in August, probably reflecting a lack of football and conference related trade.



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Attractions

- The top 10 attractions (reporting visitor figures) in the Northwest attracted 11.8 million visitors in 2007.
- Overall, the Northwest region recorded a 4% decrease in visits to attractions in 2007 (compared to 2006).
- Gross revenue from attractions in 2007 in the Northwest increased by 8% from 2006 to 2007 compared to a 5% growth in England as a whole.

The following table shows attendances to major attractions in 2007 (paid and free).

Attraction	District	Visitors (2007)	Free / Paid
Blackpool Pleasure Beach	Blackpool	5500000	F
Windermere Lake Cruises	South Lakeland	1274976	P
Chester Zoo	Chester	1233044	P
The Lowry Centre	Salford	850000	F
Tatton Park	Macclesfield	780000	P
Tate Liverpool	Liverpool	648029	F
Oswaldtwistle Mills	Hyndburn	569104	F
Blackpool Zoo & Dinosaur Safari	Blackpool	335000	P
Ullswater Steamers	Eden	303008	P
Camelot Theme Park	Chorley	270000	P

SOURCE: Visitor Attractions Trends in England – 2007, Annual Report, VisitBritain

- Visits to free attractions in the Northwest decreased by 8% in 2007 while visits to paid attractions grew by 1% (the same as that recorded by England as a whole).
- April (Easter), August (summer) and October (autumn half-term) accounted for a disproportionate number of visits - over one-third (34%) of all reported visits to visitor attractions in 2007.

DISCLAIMER: Whilst every care has been taken in the compilation of this report and the statements contained in it are believed to be correct at the time of publication, the publishers and promoters of this publication are not liable for any inaccuracies. May 2009.
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