LEEDS CITY REGION ENTERPRISE PARTNERSHIP (LEP) recognises that the visitor economy is an important sector for the region’s economy, with considerable potential for growth.¹

EXECUTIVE SUMMARY

This capacity for growth across employment, export earnings and output demonstrates a need for a coherent and collaborative approach to visitor economy across Leeds City Region’s local authority geographies.

In line with Visit England’s Strategic Framework for Tourism 2010-2020, this document outlines the current condition of visitor economy activity in Leeds City Region, as well as suggesting aims, objectives and top line strategic ambitions to deliver growth. The primary aim for the visitor economy sector in Leeds City Region is to deliver growth of 1% of the share of English tourism outside London by 2020, aligned to the Tourism UK Yorkshire and Humber Visitor Economy Strategy, 2015.

These recommendations have been developed through consultation with visitor economy representatives from the local authorities across Leeds City Region, as well as key visitor economy attractions and businesses during workshops held by Science City York to ensure requirements and areas of focus are included within the actions and recommendations.

LEEDS CITY REGION DESTINATION PLAN JUNE 2016

Photo Credit: Leeds City Council

OUR AIM IS TO INCREASE THE REGION’S SHARE OF ENGLISH TOURISM SPEND OUTSIDE LONDON BY 1% BY 2020

This plan has been developed in line with the LEP’s Strategic Economic Plan (SEP), the LEP’s European Structural and Investment Funds (ESIF) Strategy and Welcome to Yorkshire’s Regional Tourism Strategy.

THE SEP IDENTIFIES THE IMPORTANT ROLE THAT THE VISITOR ECONOMY PLAYS IN THE CITY REGION’S ECONOMY, WITH...

PEOPLE EMPLOYED IN TOURISM-RELATED INDUSTRIES.

136,000

¹ Leeds City Region Strategic Economic Plan, 2016-36, and Welcome to Yorkshire 5 Year Strategy, 2012-17
These recommendations aim to build further upon the impact of the Grand Départ of the Tour de France, as well as raising the profile of the region’s offer and developing the City Region as a cultural visitor destination, building on its sculpture, literature and broader artistic heritage.

The City Region’s extensive mix of cultural destinations and tourism attractions, along with its success in attracting major events in recent years, has not only supported tourism and hospitality businesses by attracting substantial visitor numbers, but also helped to build the City Region’s domestic and international profile. The extent to which it is possible to enhance this profile further, along with the quality of place identified above, is a key factor that affects the City Region’s ability to attract and retain skilled and talented people, investment and visitors in a highly competitive and mobile global market place.
1. CURRENT CONDITIONS

1.1 NATIONAL PERFORMANCE TRENDS

Total visits to the UK by overseas visitors increased from 24 million in 2002 to almost 33 million in 2007. After a drop in 2009 and 2010, numbers increased once more to just below 33 million in 2013.\(^2\)

The volume of nights fell from a high of 273 million in 2006 to a low of 228 million in 2012. 2013 data demonstrates an increase in volume of nights to 245 million.

National trends demonstrate that domestic overnight tourism has remained relatively flat over the last eight years, barring a peak in 2009, known as the ‘staycation effect’, and thought to be a result of the global recession.

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\(^1\) Yorkshire & Humber Visitor Economy Strategy, Tourism UK 2015

Photo Credit: Iwan Baan
1.2 YORKSHIRE AND HUMBER PERFORMANCE TRENDS

Leeds City Region specific visitor data is limited, so Yorkshire and Humber data is utilised to give a sense of the current visitor economy environment in the wider Yorkshire and Humber region. Tourism UK’s Visitor Economy Strategy for Yorkshire & Humber [2015] details the recent performance of the region’s visitor economy.

Roughly 4% of all overseas visits to the UK include a visit to Yorkshire and Humber, which equated to approximately 1.1 million visits in 2012. The average holiday taken by a visitor to Yorkshire and Humber is 7 nights, which is longer than the average for the rest of the UK, however the average spend of visitors is only £54 per night, which is one of the lowest across all UK regions.

TO THE YORKSHIRE & HUMBER ECONOMY

which places the region ahead of the North East, East Midlands and the East of England, but behind the North West, South West, South East, London and West Midlands.

Such detailed data is not available at LEP-level, but data is available to allow analysis of domestic overnight tourism in the City Region. This shows that there were on average 5.17 million trips per year to Leeds City Region between 2012 and 2015, up 1.6% on 2012-14. This growth in the City Region compares to a decline of 0.6% in trips across England as a whole over the same period.

Interestingly, of that volume of overnight stays, 26% were made by residents from elsewhere in Yorkshire and Humber, 16% by residents in the North East, 14% by residents in the North West and 10% by residents in the East Midlands, which suggests a potentially low profile in UK regions which are further afield.

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The Tour de France Grand Départ in Yorkshire in 2015 may be a factor in this contrasting performance. The City Region accounts for over 5% of all overnight trips in England between 2012 and 2015. Leeds City Region also saw total spend from overnight visits increase more quickly than in England in 2015, with total spend up by 0.9% to £919m, whilst spend across England increased by just 0.1%.

Leeds City Region consists of ten local authority areas; Barnsley, Bradford, Calderdale, Craven, Harrogate, Leeds, Kirklees, Selby, Wakefield and York. Barring Craven and Selby, each of these destinations has a destination management organisation, such as Visit Harrogate, which is usually made up of a team within the Local Authority to deliver visitor economy activity and drive growth in the sector.

Local authority teams or representatives who focus upon the visitor economy have a very broad remit, which can incorporate everything from travel trade and marketing activity and conference desks to infrastructure development.5

Additionally, the report demonstrated there is relatively little data and evidence collected following activity to determine the economic impact of visitor economy spend and projects, which will be crucial moving forward to ensure continued funding for the sector.

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5 Responses from survey undertaken by Tourism UK, when compiling a Yorkshire and Humber Visitor Economy Strategy (2015)
2.1 DEMOGRAPHIC TRENDS

Across the next 10 years the ‘baby boomer’ generation will retire, creating a group of consumerist and leisure focused potential visitors, many of whom are affluent. The number of people in England aged 60 to 74 is forecast to increase by 14% over the next decade, almost twice the pace of growth in the overall population. Additionally, owing to increased life expectancy and low fertility rates, increasingly we will see families travelling with more older people and fewer children, for example multigenerational holidays with six adults, including grandparents, parents, aunt/uncle and only two children.

14% INCREASE IN THE NUMBER OF PEOPLE IN ENGLAND AGED 60-74 IS FORCAST OVER THE NEXT DECADE

*Mid-2014 based population projections, Office for National Statistics, 2016
The UK is also seeing a shift in ethnicity, with over 13% of the UK’s population not having been born in the UK.8

Finally, demographics demonstrate the squeezed middle generation are generally time poor but value leisure time, often looking to indulge in short breaks and treats.

There is also a shift in the ‘family’ environment and we are seeing the rise of the modern family, which can be hugely varied. This occurs owing to increased rates of divorce, lesbian, bisexual, gay and transsexual (LGBT) marriage and adoption, parents choosing to have children later, one person households and many other trends.

Traditionally, immigrant visitor economy behaviour is quite different and also demonstrates scope to tap into the visitor, friends and relatives (VFR) market.
2.2 ECONOMIC TRENDS

The economic downturn has not generated a general response or experience, but rather individuals have experienced the economic downturn differently depending on a number of factors, which include business sector of employment, spending habits, geographical location, etc.

There has been a broad change in consumer behaviour in reaction to the economic downturn which can be categorised as follows:

- **47%** SMALL CHANGES IN EXISTING LIFESTYLE
- **19%** SHOPPING AROUND FOR THE BEST OFFERS
- **13%** CUTTING BACK
- **11%** DRAWING DOWN ON SAVINGS TO PAY FOR BILLS/SERVICES
- **10%** UTILISING ALL OF THE ABOVE STRATEGIES

Consumer confidence remains low, as there are indicators of only modest recovery on the horizon in the economy.

The impact of the economic downturn in reference to visitor economy funding and budget allocations is experienced at three levels:

- **LOCAL** TRAVELERS ARE LOOKING FOR SMALLER CHANGES IN THEIR TRAVEL EXPERIENCE.
- **NATIONAL** FUNDING IS BEING CUT AT THE NATIONAL LEVEL.
- **PRIVATE** SECTOR FUNDING IS BEING CUT IN INDIVIDUAL BUSINESSES.

Across the board, consumers are looking to receive better value for money and are aware of deals and offers, even if they don’t strictly need to be. This can be seen through the popularity of vouchers, Groupon offers and community offer sites for domestic and international travel, such as Voyage Privé and Secret Escapes.

![Chart showing economic trends](chart.png)

Finally, studies show that people are ultimately looking out for themselves in the current economic climate, and while 42% are spending less on holidays, they are also more focused on the experience being right for them, rather than also supporting global issues, such as green tourism.
The vast majority of adults in the UK are now online, with 86% of households having internet access, and 78% of adults going online every day or almost every day. Mobile has overtaken desktop internet usage, with the majority of web consumers preferring mobile and tablet for web browsing. This has also resulted in an expectation of internet connectivity when on holiday. 63% of people in the UK now use social networking sites and word of mouth recommendations are key across these platforms. Peer-to-peer recommendations via social media and other online platforms or websites, such as TripAdvisor, are considered major influencers for destination choices for holidays.

Through the increased use of technology in everyday lives, two distinct trends are surfacing:

1. **Fear of Missing Out**
   
   The visitor needs to be connected to those at home throughout their holiday via their technology.

2. **Joy of Missing Out**
   
   The visitor relishes the opportunity to not use technology and not feel the need to constantly network and connect with others while on holiday.

Finally, technology, more specifically the use of the internet, facilitates money saving behaviour and shopping around, through websites such as [www.lastminute.com](http://www.lastminute.com) - this is a huge trend across all socio-economic demographics owing to the current economic climate.
2.4 CONSUMER TRENDS

Research demonstrated that leisure portfolios are increasingly broad and there is now a very wide ranging leisure offer available to cater to the consumer desire for different types of holidays. Total household spend is reducing, however spend on leisure time is generally increasing, demonstrating the importance people place on their leisure time.

53% of the group surveyed stated they experience daily time pressure and 38% felt they have a high degree of freedom. The study also demonstrated the demand for control is increasing, as people feel they want more choice over their leisure time when time is considered precious. Additionally, there is an increased interest in short breaks to relieve the feelings of stress and time pressures.

Consumer choice is increasing, but this adds an extra layer of complexity for the consumer, especially in regards to leisure time. 54% state trying new things is increasingly important.

In contrast, owing to the short breaks trend, urban tourism is also considered a key growth area, especially in Northern cities, which are experiencing increased funding and a renewed appetite for regeneration and should be re-branded as an exciting visitor destination. This regeneration is crucial for growth and connectivity across markets, however the study demonstrates that authenticity is key and must be maintained.

89% OF CONSUMERS FEEL THAT LEISURE ACTIVITY AND SPENDING TIME AND MONEY ON LEISURE TIME IS IMPORTANT

60% OF CONSUMERS ARE VERY SATISFIED WITH THEIR FREE TIME

49% FELT THAT CULTURE IS IMPORTANT

80% OF THE UK’S POPULATION LIVE IN URBAN AREAS, WHICH IN TURN MEANS THERE IS AN APPETITE FOR RURAL EXPERIENCES
3. **AIMS AND OBJECTIVES**

3.1 **AIMS**

The aim in the national tourism strategy set by Visit Britain is reflected in Leeds City Region’s aims and objectives:

**TO MAXIMISE THE VISITOR ECONOMY CONTRIBUTION TO THE ECONOMY, EMPLOYMENT, ENVIRONMENT AND QUALITY OF LIFE IN LEEDS CITY REGION.**

**VISIT BRITAIN’S NATIONAL STRATEGY SETS A TARGET FOR ANNUAL GROWTH OF 3.5%.**

The British and English targets directly correlate to targets set for both Yorkshire and Humber and Leeds City Region; if the overall number of visitors to Britain increases then a share of these visitors will want to visit Yorkshire and/or Leeds City Region.

Whilst any growth in tourism activity in the City Region would contribute towards national targets, the overarching aim of the Yorkshire & Humber visitor economy strategy is to increase the region’s share of tourism spend in England outside of London. This reflects the region’s ambition to achieve tourism growth over and above the average for other regions, whilst also acknowledging London’s ability to attract significant numbers of tourists and business visitors. Whilst many visitors to London are unlikely to venture beyond the capital, there is nevertheless an ambition to attract more of these visitors to Yorkshire.

**YORKSHIRE AND HUMBER**

**TARGET = 1% BY 2020**

**TO INCREASE THE REGION’S SHARE OF ENGLISH TOURISM SPEND OUTSIDE LONDON BY 1% BY 2020**

Yorkshire & Humber accounted for 11% of English tourism spend outside of London in 2013, so the ambition is to increase this to 12% by 2020.
3.2 OBJECTIVES

Directly comparable data is not available to allow the same analysis to be carried out at City Region level, as data on overseas visitor spend is not available below Yorkshire and Humber level. However, data on domestic tourism spend suggests that half of all tourism spend in Yorkshire and Humber takes place in Leeds City Region. Therefore, if Leeds City Region grew its share of tourism spend outside London by 0.5% by 2020, this would represent its contribution to the overall Yorkshire and Humber target.

Finally, an important aim for the visitor economy in Leeds City Region is to develop robust reporting and evaluation frameworks to demonstrate the impact and economic outputs of visitor economy spend and resource, to help secure future funding and increased focus on the sector.

SECONDARY AIMS WILL FOCUS ON INCREASING OTHER VISITOR ECONOMY FACTORS, WHICH WILL HAVE DIRECTLY POSITIVE IMPACTS UPON THE ECONOMY:

- Increase dwell time of visitors and number of nights spent in Leeds City Region
- Increase visitor spend in Leeds City Region
- Increase employment figures in visitor economy roles across Leeds City Region

Secondary aims will focus on increasing other visitor economy factors, which will have directly positive impacts upon the economy:

- Utilise key products thematically to create a compelling leisure offer across Leeds City Region for potential visitors
- Work closely with the private sector and take an inward investment approach to encourage further product development
- Develop a central Leeds City Region events and conference bid service to continue to attract large scale events and conferences
- Develop a positioning strategy for Leeds City Region and deliver a national and international marketing campaign to raise the profile of the visitor offer
- Support economic development of transport across Leeds City Region, including entry points, to enable easier access for visitors
- Focus upon distinct, large scale projects, to ensure maximum return on investment and regional impact
- Update the service and offer at Tourist Information Centres (TICs) across the region to cater to the increasing expectations of real time digital services. Although TICs continue to offer a valuable service in visitor locations, many remain focused on traditional methods of sharing information that has not kept pace with changing visitor needs and expectations, such as the provision of real time information via social media.
- Develop a rigorous reporting and evaluation framework to accurately monitor and evaluate activity and outcomes to assist with securing and shaping future funding.
4. **KEY ACTIONS AND PRIORITIES**

While evidence suggests that regional tourism performance will be closely linked with national trends, such as poor weather or the economic climate, it is important to develop strategic points of focus and clear actions to enable maximum return of spend and resource allocation to drive economic growth across the visitor economy sector.
4.1 LEEDS CITY REGION COLLABORATION

The initial and most important element of this Leeds City Region destination plan is a need to improve cross-boundary collaboration between the local authority areas within the broader City Region geography.

This highlights a need for improved collaboration to deliver a multiple-destination offer, focused on themes, such as cultural breaks, rather than small geographic locations.

This approach should be adopted when taking forward all actions and key projects focused on driving the Leeds City Region visitor economy.

4.2 PRODUCT DEVELOPMENT

New attractions, new accommodation and newly developed packages and itineraries can have a significant positive impact upon the performance of the visitor economy sector. For example, new hotel developments not only deliver new jobs, but stimulate new sales and marketing across the visitor economy in the area, as well as creating a significant amount of visitor expenditure in the region.

It is recommended that an inward investment style approach is taken to visitor economy product development, where market need is demonstrated and collectively local authorities pitch opportunities to private sector developers to demonstrate the scale of the opportunity in the region and the demand for their product or offer. Once suitable opportunities are identified, engagement with the travel trade is needed to ensure that attractions and destinations in the City Region are included on UK-wide packages and itineraries.

In line with the trends which highlight the importance of technology, it is important during consultation and product development to consider potential new trends and new forms of technology, such as 3D Imaging, Oculus Rift and other visual reality technology which could be utilised as new product or forms of destination choice inspiration.

Similarly, consultation demonstrated a requirement for a more joined up offer in rural areas, such as cycle trails with accommodation along the route, as well as cycle friendly cafes/restaurants, etc. Furthermore, the importance of the experience in destination was demonstrated as key, with a focus on all visitor economy partners working closely to deliver an authentic experience for the visitor, with a focus on the local offer.

In addition, a key account management model is proposed, whereby visitor economy representatives in the city region’s local authorities act as a focal point for tourism related activity in their area. These account managers can bring together attractions, hotels, and other visitor economy businesses to help developed new initiatives whilst ensuring activity is well aligned and resources are focused effectively. By working closely with private sector businesses already in the visitor economy space within the region, local authorities can consult with a critical mass of the private sector representatives on investment strategy, gap analysis, infrastructure and product development issues.

MARKET RESEARCH AND INSIGHTS DEMONSTRATE THAT VISITORS, BOTH DOMESTIC AND INTERNATIONAL, DO NOT SELECT DESTINATIONS BY THEIR LOCAL AUTHORITY BORDERS BUT RATHER BY THE PRODUCT AND ATTRACTIONS ON OFFER.
4.3 EVENTS AND CONFERENCE BID SERVICES

Major projects and events, such as the Grand Départ, Rugby World Cup 2015 and the ITU World Triathlon Series 2016 can generate new reasons to visit the region for repeat visitors, or put the region on the map as a place to visit for new visitors.

Analysis of the 2014 Tour de France Grand Départ in Yorkshire\textsuperscript{10} found that, in delivering an economic boost of...

\textbf{£102M FOR YORKSHIRE, THE EVENT ALSO HAD WIDER IMPACTS.}

Of the over 1 million who attended the event, 113,000 came from overseas, translating into...

\textbf{£36M OF SPENDING BY OVERSEAS VISITORS}

Of the million Stage 1 and 2 spectators from outside Yorkshire...

\textbf{75\% STRONGLY AGREED THEY WOULD BE MORE LIKELY TO RECOMMEND YORKSHIRE TO FRIENDS AND FAMILY.}

Of the same group, 72\% said their image of Yorkshire had been enhanced and that 66\% would be more likely to visit Yorkshire for a short break or holiday...

\textbf{64\% OF ATTENDEES ALSO SAID THEY WERE VERY LIKELY TO RETURN IN THE NEXT TWO YEARS, WHICH WOULD TRANSLATE INTO AN ADDITIONAL IMPACT OF £24M FOR YORKSHIRE IN THE FUTURE.}

Evidence suggests that these repeat visits are taking place, with 44\% of non residents who attended the Grand Départ already visiting the region again three months later.

Other large scale events have also achieved significant impact in the region in recent years. Research suggests that the Rugby World Cup 2015 Tournament attracted over...

\textbf{400,000 OVERSEAS VISITORS TO THE UK, GENERATED £2BN IN ADDITIONAL OUTPUT FOR HOST CITIES, INCLUDING £37M FOR LEEDS.}

The city hosted two matches in the tournament, selling 67,000 tickets - 31\% of which went to international visitors.

Leeds City Region needs to continue attracting events such as these to continue to further build the profile of the region and generate additional reasons for people to visit. In line with the first objective to work more collaboratively across the region, it is recommended that a strategic approach is developed across Leeds City Region for attracting and bidding for major events.

This approach should also be followed in regards to attracting major conferences in line with key business sectors across Leeds City Region, which can also provide a major source of business visitors and thus visitor spend and economic growth in the region.

Additionally, a Leeds City Region ambassador scheme should be further developed, working closely with the region’s universities, to bring new business to the region, as well as offering welcome services.
4.4 PROMOTION AND BRAND MANAGEMENT

Studies show that the Yorkshire brand is strong and resonates with a large proportion of the domestic market\textsuperscript{11}, while there is relatively little knowledge of Yorkshire and the North internationally. However, the Leeds City Region geography is relatively complex for a visitor to grasp, as it is not a clear location with one identity.

Consequently, in order to build upon the current levels of awareness of Yorkshire, high-level strategic marketing and brand promotion is recommended at a Leeds City Region level. A positioning strategy needs to be developed to determine how best to convey the Leeds City Region geography and product offer to the relevant audience, as it does not currently exist to the public as a coherent geography.

Once the positioning strategy has been completed the recommendations should be implemented and a strategic national marketing campaign should be developed to raise the profile of the City Region and its offer to both business and leisure visitors.

In order to deliver a strategic high-level campaign, it is recommended that this is primarily managed and delivered by a central resource, owing to resource capabilities in local authorities, as well as overarching knowledge of the product across all ten local authority geographies.

4.5 TRANSPORT AND INFRASTRUCTURE

Visit England’s Strategic Action Plan for Tourism 2010-2020 includes a Transport and Action Plan, stating that all sectors and industries, including the visitor economy, are impacted by transport and infrastructure developments. This demonstrates the importance of transport and infrastructure for destinations around the UK to ensure potential visitors can reach Leeds City Region easily and quickly, as well as travel easily between attractions/locations once in destination.

Therefore, it is important to note that transport developments, including airline routes to Leeds Bradford Airport, train links (HS2/HS3), road network developments, should be supported and encouraged by visitor economy representatives across Leeds City Region, as these developments will directly impact the scope for increased visitors.

Additionally, it is important to consider the relationship between all ports of entry, even those outside the Leeds City Region geography, such as Manchester Airport, London Heathrow, East Coast ferry ports, etc. These relationships should be developed to explore the opportunities for profiling Leeds City Region’s visitor offer at these points of entry.

\textsuperscript{11}Yorkshire & Humber Visitor Economy Strategy, Tourism UK 2015
5. **KEY PROJECTS**

To deliver the primary and secondary aims, it is recommended that Leeds City Region focus on a series of distinct visitor economy projects, which will deliver measurable impact and outcomes in line with the aims.

Some of these will require additional resources. Funding resources could include those from local authorities – this may require just a different way of working rather than additional cash funding, other funding sources which could be considered with immediate effect, for example, will include the European Agricultural Fund for Rural Development (EAFRD) as part of the European Structural and Investment Funds (ESIF) Leeds City Region Strategy.

Focusing on a range of key, but focussed, projects will enable resources to be managed effectively and drive growth on a regional scale, as opposed to small scale outcomes driven by pockets of activity.

Recommended visitor economy projects, as outlined in the Welcome to Yorkshire regional strategy, include the Tour de Yorkshire, Cultural Tourism agenda, large scale events, business tourism, and international and domestic promotion, developing the Leeds City Region brand and business engagement.

Projects will need their own strategic direction, objectives, KPIs and evaluation to ensure activity can be accurately monitored and deliver maximum return on investment.

This also aligns with the work of the ESIF Visitor Economy Sounding Group which further considered how EAFRD could be used to support small local businesses in the tourism industry.
5.1 SUPPORT FOR THE RURAL VISITOR ECONOMY USING EAFRD

A focus for using EAFRD would be prioritised on:

1. Support for new or existing micro and small tourism businesses to invest in quality accommodation with the aim to attract more overseas visitors to stay in Leeds City Region rural areas for longer and spend more in the local economy. Applicants will also be encouraged to demonstrate how improving accommodation will contribute to increasing the number of visitors to the City Region outside of London. This will be measured through improved occupancy and length of stay, and an increase in overseas visitors. For example increasing one day stays to two day stays, 4 day stays to a week. Funding activity will support the development of innovative new products also taking in to account the growing demand for digital services. The vast majority (over 97%) of businesses providing accommodation, food and drink services in the City Region are small and micro businesses, so helping these businesses enhance their offer will be crucial to success. Nationally, overseas tourists are showing an increasing preference for hotel and guest house accommodation, with the proportion of overnight stays accounted for by hotels and guest houses increasing from 20% in 2004 to 27% in 2013.13

2. Support for new or existing micro and small tourism businesses and public bodies investing in small scale infrastructure for the development of outdoor tourism, such as cycling and walking to enhance the tourism offer of a destination. This would enable us to build on the cycling legacy created by the Tour de France. In spite of the region’s outstanding countryside, Yorkshire and Humber has a lower proportion of trips made for outdoor activities such as long walks and cycling – 25% of trips to Yorkshire include some such activity, compared to 27% nationally.14 The interest generated by the Tour de France provides an opportunity to address this, with 63% of spectators saying they were inspired to increase their active participation in sport.15 Ensuring appropriate infrastructure is available to facilitate this increased demand will be crucial to maximising the opportunity, though any such improvements must also take account of and be sympathetic to existing land uses.

3. Support for interventions which will enhance existing visitor attractions to extend the tourism season and encourage visitors to stay for longer. Priority will be given to those that will attract visitors between October and March and those that don’t depend on the weather.

4. Support for new and existing events and festivals seeking to grow the number of target overnight stays. These should be developed in an innovative and sustainable way with priority given to those which have the potential to create a legacy and can be built upon in future years as opposed to one off events. Priority will also be given to projects which can demonstrate they will encourage visitors from outside the local authority boundary.

It is expected that applicants could apply for projects which address one or more of the above priorities.

5.2 MODERNISATION OF TOURIST INFORMATION CENTRES

Reflected in the trends highlighted by Visit England there has been a shift in how consumers access and search for information, moving from face to face and telephone calls to the use of the internet, especially across mobile and tablet. This highlights a need to consider the role of tourist information centres in destinations across Leeds City Region and the requirement to modernise the offer.

Local authorities need to implement new ways of working in Tourist Information Centre’s, which is focused on digital channels. This could include but would not be limited to utilising social media channels to respond to visitor questions and encourage potential visitors to be inspired to visit, as well as hosting relevant collateral online.

Digitalising the (TIC’s) offer will ensure visitors are able to access the information they require in real time, as has come to be expected by consumers, whilst also combating issues of reduced footfall by increasing interaction online.

5.3 EVALUATION AND REPORTING FRAMEWORK

To ensure proper reporting of the impact of visitor economy activity and spend in the sector, a detailed reporting and evaluation framework needs development, in line with Visit England and Visit Britain evaluation frameworks to ensure growth and economic impact are reported, while also enabling like for like comparisons with other destinations.

It is important that this is implemented across all Leeds City Region destinations to enable accurate reporting for the whole of the region, providing benchmarks for future work and evidencing the impact of the spend to assist with securing future funding and shaping future projects.
The aim of all activity across the region’s visitor economy sector is to increase Leeds City Region’s share of English tourism by 1% by 2020, to build upon the current share of tourism in England.

In order to continue to progress and remain relevant to the consumer, Leeds City Region visitor economy representatives need to keep abreast of the trends and issues across the sector, to ensure the offer for visitors is in keeping with consumer demand.

Leeds City Region local authorities need to work collaboratively to create a clear visitor offer which is not focused on small geographic regions, but on key product and attractions across the whole region which will appeal to the potential visitor.

A positioning strategy needs to be developed and implemented to ensure clear understanding of the Leeds City Region geography and determine how the region can work collaboratively to deliver a clear and compelling visitor offer.

A number of actions have been recommended to ensure maximum impact and return on investment, but key priorities for action are: a collaborative approach, focusing on large scale key projects, support for rural business to attract more overseas businesses to stay in Leeds City Region’s rural areas as well as investing in the supporting local infrastructure, and developing a clear evaluation framework.