



Discover how the Yorkshire & Humber **Regional Visitor Survey 2008/2009** can help your business

- Understand your visitors better and discover how to prioritise your target markets
- Uncover further marketing opportunities you can capitalise upon
- Focus on marketing that actually works
- Reap greater rewards from repeat visitors and recommendations
- Find out how you can help make Yorkshire even better

Welcome
to **Yorkshire**
yorkshire.com



The YHRVS is the largest regional visitor survey ever undertaken in England. It gives us a valuable insight into our visitors, helping to refine marketing and plan for the future. The survey will help us to track progress and enhance the destination. It is now easier to identify opportunities to encourage visitors to spend more, stay longer and recommend Yorkshire to others.

The data from the survey provides us with a better understanding of:

- Who our visitors are
- Where our visitors come from
- What our visitors come for and what they expect

This document provides key recommendations on further opportunities your businesses could be taking advantage of, including:

- Understanding how and who to prioritise as your visitor target markets
- Discovering what further marketing opportunities can be capitalised upon
- Identifying how you can make Yorkshire even better

The Yorkshire and Humber Regional Visitor Survey (YHRVS) commissioned by Yorkshire Forward, is managed by Welcome to Yorkshire and supported by each of the six Area Tourism Partnerships. It focuses on leisure visitors. In total 10,752 visitors were interviewed at locations throughout Yorkshire between May 2008 and April 2009. In addition 2,031 people completed an online survey. You can find out more about the survey and your ATP area results by downloading key findings from <http://www.welcometoyorkshire.net/Research/Regional-Visitor-Survey.aspx>.

If you want to delve deeper into the results, it is important to take into account which target markets come to your ATP area and the differences between day and staying visitor markets.

Prioritise Target Markets

Welcome to Yorkshire has analysed the postcodes of all UK survey respondents, using Experian's MOSAIC UK Classification system. This powerful segmentation tool allows us to understand in more detail the income, life stage, media preferences and key behaviour patterns of our visitors.



Yorkshire Dates

10,752 visitors
were interviewed at locations
throughout Yorkshire

Please note that this year's survey excludes North and North East Lincolnshire. These results will be included in 2009/10 survey results, which will be available in July 2010.

Mosaic Groups	Day Visitors	Staying Visitors
C Suburban Comfort	20%	21%
D Ties of Community	22%	16%
B Happy Families	12%	13%
A Symbols of Success	11%	12%
H Blue Collar Enterprise	8%	9%
J Grey Perspectives	7%	8%
K Rural Isolation	5%	6%
E Urban Intelligence	3%	6%
G Municipal Dependency	6%	4%
I Twilight Subsistence	3%	2%
F Welfare Borderline	2%	2%
U Unclassified	1%	1%

- **Ties of Community (21%)** live in industrial or manufacturing towns. Often have children in the household or family living close by. Work in lower supervisory or skilled jobs. Enjoy package holidays or summer coach trips to seaside. Hobbies include music, computer games, pub or cinema.
- **Suburban Comfort (20%)** families with older children living in comfortable homes, often in South & East of England. Tend to be at intermediate manager level. They tend to enjoy three plus holidays a year. Package holidays are popular as is self-catering and weekend breaks. Hobbies include outdoor activities such as bird watching, hiking & golf.
- **Happy Families (13%)** younger couples raising children, living in modern housing, with good career prospects. Often book holidays online, enjoy short breaks, outdoor activities & self-catering holidays.
- **Symbols of Success (11%)** older with high incomes. More than half of this group are based in London or the South East. Take three plus holidays a year & several business trips, which they tend to book online. They tend to enjoy independent foreign travel. Hobbies include the theatre, classical music, art & golf.

Visitor Origins	Total	Day Visitors	Staying Visitors
Yorkshire & the Humber	56%	72%	23%
North West	11%	9%	13%
East Midlands	10%	8%	13%
North East	7%	7%	8%
London & South East	5%	0%	15%
East Anglia	3%	1%	9%
West Midlands	3%	1%	6%
South West	2%	0%	5%
Scotland	2%	0%	5%
Wales	1%	0%	3%
Total Visitors	9,267	6,247	3,020



Create a “pen portrait” – you simply have to imagine who your customers are, what they are like and what drives them. Keep adding and moulding to the picture until you are happy that you can almost hear them speak to you. Anything you create afterwards can be held up to scrutiny by this imaginary friend.

People living within Yorkshire are an important tourism market, with 72% of our day visitor markets living within the region and around 23% of our domestic staying visitor market from within Yorkshire. Outside of the region key staying visitor markets come from the South East and London (15%), North West (13%), East Midlands (13%) and East Anglia (9%).

Welcome to Yorkshire is now using the results from the survey to refine its target markets. It makes sense for all of us to ride on this activity and to benefit from their umbrella marketing.

Thinking about your target markets:

- Look at the research findings to see how your markets align with those shown by the research.
- Consider spending just a few moments describing each of your target markets in detail, using “pen portraits”. Thinking about each of your markets’ lifestyle, motivations and mindset can help you “get inside the heads” of potential visitors, develop more targeted promotions and write more compelling sales messages.
- The Mosaic market segments can help you to do this!

For further information on each of the Mosaic group types (©Experian 2007) please see the Glossary section or go to our industry website [http://www.welcometoyorkshire.net/Research/Market-Profile/Market-Fit-\(MOSAIC\).aspx](http://www.welcometoyorkshire.net/Research/Market-Profile/Market-Fit-(MOSAIC).aspx) to find out more about our regional and ATP area visitor Mosaic markets.



Market Opportunities

The results highlight several market-related opportunities which could benefit your business or area:

1. MAKE MORE OF DAY VISITORS

Two thirds (65%) of all visitors to Yorkshire are day visitors. Day visitors are valued for their loyalty and frequency of visits, particularly by attractions. We still need to encourage them to spend more or stay longer. Here are some ways we can do that:

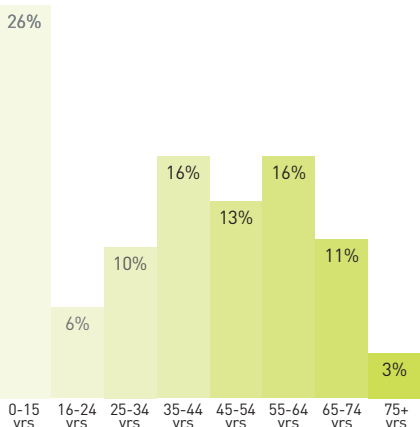
- Encourage day visitors to bring friends and family with them, increasing group size.
- Promote the idea of a “day out with friends” or a bigger family get together.
- Add an “invite your friends to join you” button to your website.
- Encourage day visitors to eat in the area before they go home. They need recommendations for good places to eat.
- Encourage cafes and restaurants to open between 5.00 – 6.30pm so families can eat together before children’s bedtime.
- Encourage day visitors to stay just one night. Make it easier by highlighting accommodation close to attractions.
- When promoting events that start early in the morning or finish late at night, suggest an overnight stay. Make it easier by listing local accommodation.

2. BE FAMILY FRIENDLY

Over a quarter of all visitors to Yorkshire are children. Families are an important market. A high proportion of first-time visitors to Yorkshire bring children. If they have an enjoyable experience, they are likely to return. They could become loyal, repeat visitors.

We need to ensure we have family friendly facilities and demonstrate that we really understand their needs.

- What family friendly services or new products do/could you offer?
- Can you join with others in your area to promote them?
- Do we make family friendly facilities obvious enough? Do we all need to make it easier for families to enjoy Yorkshire? How?



Age Group of Visitors



Families are an important market. Over a quarter of all visitors to Yorkshire are children.



48%
of visitors
are family groups

12%
of visitors
visited friends or relatives

“Invest in staff training to greet visitors in their own language”

Core European markets:



Emerging markets:



3. YORKSHIRE – THE PLACE TO ENJOY TIME WITH FRIENDS AND FAMILY GROUPS

Yorkshire attracts a high proportion of family groups (48%) and has a strong Visits to Friends & Relatives (VFR) market (12% visited friends or relatives).

An obvious way to increase revenue from visitors is to encourage them to bring other friends and family with them. The research shows visitors think Yorkshire is friendly, making the region a great destination in which to enjoy time with friends and family.

- Can you offer a good central location for different generations of families or friends to meet up with each other?
- Could you target small friendship groups, encouraging them to take an indulgent break together? You could provide information on activities and accommodation that can be enjoyed together as a group, for example a weekend of shopping, spa and dining together.

4. ATTRACT MORE VISITORS FROM OVERSEAS

Overseas visitors are an important and attractive market for Yorkshire. They stay longer and spend more than UK visitors. We need to make sure overseas visitors feel welcome and that it's easy for them to get the information they need.

- If you want to attract overseas visitors, make sure you understand them and they can understand you. Consider translating some parts of your website into key foreign languages. Invest in staff training to **greet visitors in their own language**.
- Overseas visitors particularly appreciate “insiders’ tips” so they can gain a deeper understanding of the places they visit.
- **Join forces** – it can be more expensive to promote to overseas visitors – work in partnership with Welcome to Yorkshire and your Area Tourism Partnership to make marketing more effective.
- Find out more about each of our overseas markets by downloading the market profiles from the Insights & Statistics section of www.visitbritain.org.

Currently key overseas target markets for Welcome to Yorkshire include:

- Core European markets such as France, Spain, Germany, Italy and the Netherlands.
- Profitable international markets with potential for growth such as the USA, Canada and Australasia.
- Emerging international markets including China and India, with secondary interest in Hong Kong and Singapore.

5. MORE OPPORTUNITIES FOR SPECIAL INTEREST BREAKS

Special interest breaks are showing strong growth in the UK. Welcome to Yorkshire has already identified special interest breaks as a potential high value market. Yorkshire has good product strengths with outdoor pursuits such as walking and mountain biking. There is strong interest too in cultural tourism.

The research indicates we have an opportunity to grow this sector much more.

- Which special interests can you tune into?
- Could you make it easier for visitors to enjoy more activities and special interests, through better product packaging or by showing links between accommodation and attractions?
- Can you identify any emerging trends or interests and capitalise on them?

Yorkshire Dales



Special interest breaks such as walking, mountain biking and cultural tourism are showing strong growth in the UK.

Yorkshire Sculpture Park



Day visitors should be valued for their loyalty and frequency of visits, particularly by attractions.





Repeat visitors need to be reminded to come again, with some new ideas and inspiration

	ALL VISITORS	REPEAT VISITORS	FIRST TIME VISITORS	OVERSEAS VISITORS
Previous experience & local knowledge	56%	72%	-	28%
Recommendation or word of mouth	23%	17%	44%	45%
By chance or because an opportunity presented itself	13%	12%	16%	9%
The internet	12%	9%	22%	24%

Visitor information sources before arrival



Focus on Marketing that Works

The research shows the strongest influences on visitors and what really makes them decide where to visit and what to do. Previous experience and recommendations are top of the list for all visitors. It is essential that we offer excellent customer service to encourage repeat visits and recommendations.

It is important to differentiate between marketing activities and messages for pre- and post-arrival. The web is the biggest controllable influence pre-arrival and is likely to continue to grow. With the increased use of devices such as Blackberries and iPhones, it will be also be an important influence during visits.

The internet is a particularly important source of information for first-time and overseas visitors. Online booking facilities are important. A high number of people still make phone calls to book, presumably either because online booking isn't available or because websites don't answer all their questions.

Visitors also use magazine and newspaper articles, and guidebooks. Media features and articles remind previous visitors and prompt further word of mouth recommendations. Leaflets and print material are used to a much smaller degree, but mainly once visitors are in the area.

We need to adapt marketing to take account of the survey results:

- **Continue to work towards excellent customer satisfaction** throughout Yorkshire, to generate more word of mouth recommendations.
- **Make specific use of recommendations** as a marketing activity and convert them into bookings.
- **Focus more effort on internet marketing** – make it easier to book online and make information more comprehensive.
- **Continue to influence the media** and trigger more word of mouth recommendations through PR activities.
- **Reduce dependence on print** as a pre-arrival marketing activity.
- **Vary marketing messages**, depending on whether we're targeting first time or repeat visitors. First-time visitors will be attracted by the better known attractions and destinations, backed by recommendations and endorsements from others. Repeat visitors need to be reminded to come again, with some new ideas and inspiration.

Reaping Rewards from Repeat Visitors and Recommendations

Yorkshire has a high proportion of repeat visitors. In total 89% of visitors said they were likely to return to Yorkshire within the next two years, suggesting a loyal and regular visitor base. The majority, 96%, of visitors said they were likely to recommend Yorkshire to others.

These facts can be used as part of an overall value/reassurance message, which is particularly important during a recession when visitors welcome value for money and value for time messages.

There are three further ways we can use the strong loyalty towards Yorkshire:

- Leverage repeat visitors' loyalty and encourage them to bring more friends and family with them on their next trip.
- Use the recommendations from repeat visitors to attract new, first time visitors who can in turn be encouraged to convert into repeat visitors.
- Leverage repeat visitors' loyalty and enjoyment of Yorkshire by encouraging them to do and spend more when they visit.



TELL A FRIEND

Make recommendations easy add 'tell a friend' or 'recommend to others' button to your website.

“friendly, relaxing, fun, exciting, contemporary”

Frequently used words to describe Yorkshire.

Making it Easier to Recommend Yorkshire

Visitors say they want to recommend Yorkshire to others. We need to make it easy for them to do so. The internet and social media are good ways to do this:

- **Make recommendations easy** – use “tell a friend”, “recommend to others” buttons on websites.
- **Increase destination information** and coverage of Yorkshire on referral and review websites such as Tripadvisor.
- **Use social media** such as blogs, twitter and social networking to raise your profile and encourage satisfied visitors to do the same and write about you. The research shows the power of these third party recommendations and endorsements.
- **Continue to provide existing visitors with reasons to return**, encouraging them to bring others. Join together with others to undertake e-mailings and remind visitors to come back again and again.

What Visitors Think of Yorkshire?

Key words

Visitors were asked which words they would use to describe Yorkshire. This is an important question because these are the words that visitors are likely to use to others when they talk about their experiences. It is also useful to know how their actual experience of Yorkshire has influenced their thoughts and the impact of marketing messages.

“Friendly” and “relaxing” were the most frequently used words. Day visitors were more likely to select words such as “fun” and “exciting”. Some urban areas were described as “contemporary”.

You might like to use some of these words or similar ones or reflect these values in your choice of images or copy in your own marketing as they reflect visitors’ mindsets.

Building on our strengths

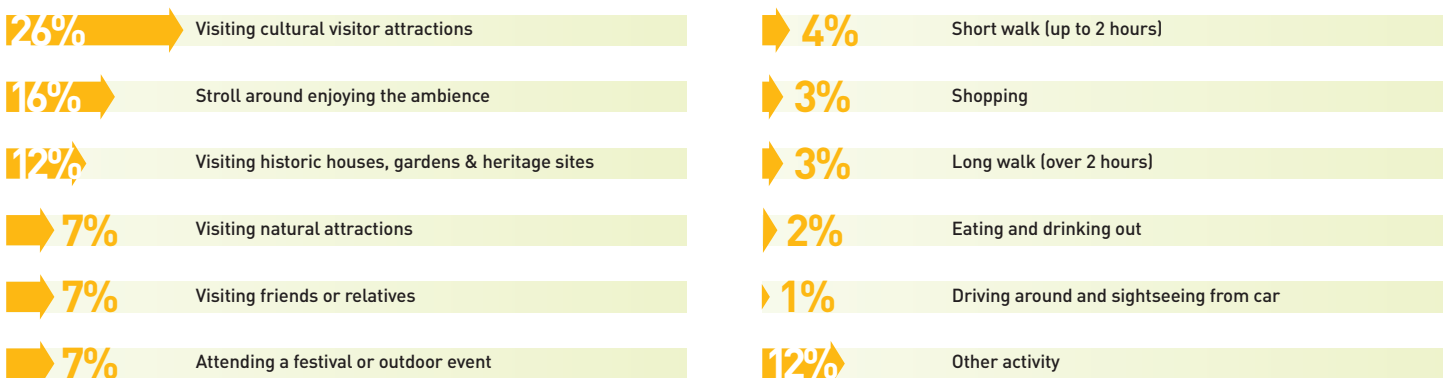
The research gives us a detailed picture of what types of visitors preferred which activities. It highlights the activities that attracted visitors to Yorkshire in the first place as well as showing what they actually did when they were here.

The most popular main activity undertaken was visits to cultural attractions such as museums, art galleries and craft centres. This underpins the strengths of the heritage and cultural product in Yorkshire.

The scenery/countryside followed by museums/galleries/sculptures were the most cited aspects of the trip visitors had enjoyed and can therefore be considered key product strengths of Yorkshire.

We need to use these key strengths in all marketing. Many visitors enjoy absorbing the atmosphere and strolling around to see different places. We need to help them to explore the area in more depth, to have stronger, more memorable experiences and to increase spend.

Main activity of visitors



Headrow, Leeds



Shambles, York



Spurn Point



For further information about marketing opportunities in your area and regionally please contact your Area Tourism Business Engagement Representatives:

- **Dales & Harrogate & Moors & Coast:** David Shields, davidshields@hambleton.gov.uk or tel. 01845 523877
- **North and North East Lincolnshire:** Margaret Price, Margaret.price@northlincs.gov.uk or tel. 01724 297356
- **Visit York:** Chris Saunders, cs@visityork.org or tel. 01904 554620
- **Visit Hull and East Yorkshire:** Andy Gray, andy.gray@vhey.co.uk or tel.01482 486604
- **Yorkshire South:** Caroline Wilson, caroline@yorkshiresouth.com or tel.0114 201 1011
- **West Yorkshire:** Liz Tattersley, ltattersley@yorkshire.com or tel.0113 322 3569

For more information about the research and about Welcome to Yorkshire: visit

www.welcometoyorkshire.net
or contact a member of the Market Intelligence team on marketintelligence@yorkshire.com or tel. 0113 322 3512

Increasing Visitor Spend

The research highlights some important points about visitor spend. There are many ways in which we can try to increase visitor spend:

- Visitor spend is lower after 5pm. We need to ensure that the opening and closing times of visitor facilities, shops and cafes are still appropriate to the needs of visitors.
- Offer opportunities for upgrading and enhancing the visit experience, especially for those visitors who have been before and want to try new and unique aspects.
- Offer unique and distinctive products, gifts and food/drink that can only be purchased locally.
- Make sure that all staff know how to up-sell and cross-sell, and have enough product knowledge to do so.

Making Yorkshire Even Better

As we have seen, recommendations from others and repeat visitors are crucially important to Yorkshire tourism. The research shows that Yorkshire performs well in most aspects of customer service in terms of actual service, quality of the product and value for money. It is reassuring that the majority of visitors give a high satisfaction rating, with relatively little difference between their expectations and the reality.

However, we cannot rest on our laurels and need to continue to improve. Some improvements were suggested such as better signage, less expensive/more car parking, better upkeep of the location and more toilets. Improving these facilities will increase satisfaction levels among visitors but will also benefit residents.

We need to continue to refresh and improve the Yorkshire product, at all levels.

- Can you provide better links between accommodation providers and attractions?
- What product combinations or packages can you offer to make it easier to enjoy a visit to Yorkshire?
- Can you find a new way for visitors to enjoy their trip or create a new talked-about experience?
- What sort of additional services could you provide to offer really amazing customer service?
- What areas of your service do you need to upgrade or improve?

Value for Money

Very few visitors complained about the overall value for money of their visit to Yorkshire. This means it is important to continue to promote Yorkshire as a high quality, value for money destination.

- It is vital to have confidence in the Yorkshire product and to resist discounting unless it is for very specific periods of time or very clear tactical reasons.
- It is crucial to maintain and improve customer service across all areas, and to keep reinforcing the value for money message, underpinned by high satisfaction levels.



working in partnership with Welcome to Yorkshire to grow the region's visitor economy

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Glossary of Experian's MOSAIC UK Group Classification system

A Symbols of Success	
WEALTH	Ranked 1/11 with high incomes from professional occupations. High net worth.
AGE / LIFE STAGE	Aged 45 to 54, middle-aged with teenage children
MEDIA PREFERENCES	Little TV but likely to read broadsheets such as The Daily Mail and The Telegraph and subscribe to magazines such as the Economist or Time
HOLIDAYS	Unlikely to be purchased from brochures of major travel companies, more likely to involve self-catering at owned or rented villas, skiing, boating or independent foreign travel
LEISURE	Different for individual family members. Interests may include golf, theatre, wine, spa days and summer camps
B Happy Families	
WEALTH	Ranked 4/11 with steady incomes and often two parents working, although likely to have strong requirement for credit (mortgages, car finance etc)
AGE / LIFE STAGE	Aged 35 to 44, mostly younger couples now raising children
MEDIA PREFERENCES	Likely to have Sky or Cable, popular newspapers include The Daily Mail and The Telegraph, often buy magazines on specialist leisure and sporting interests, much use of internet
HOLIDAYS	May involve camping or caravanning but more likely to take independent formats, e.g. self-catering cottages rather than coach tours or hotel packages. Often seek out active or special interest activities.
LEISURE	Active sports such as squash, badminton, golf, walking, sailing and mountain climbing
C Suburban Comfort	
WEALTH	Ranked 2/11, mostly in intermediate level white collar occupations and well set in their careers
AGE / LIFE STAGE	Aged 45 to 64, predominantly married with children growing up and becoming more independent, many already left home for university
MEDIA PREFERENCES	Prefer The Daily Mail and The Express or Telegraph
HOLIDAYS	Package holidays are popular as is self-catering and weekend breaks
LEISURE	Often focus on excursions into the country to see historic houses and gardens, supporters of local theatre
D Ties of the Community	
WEALTH	Ranked 7/11, traditionally rely on manual rather than white collared employment often benefiting from social support and money hard to come by

AGE / LIFE STAGE	Younger than average population with young married couples and co-habiting partners bringing up young children
MEDIA PREFERENCES	Watch a lot of TV, likely to read papers such as The Mirror and to a lesser extent, the Sun. Buy or read celebrity magazines. Many enjoy Cable or Sky and make use of internet
HOLIDAYS	Despite low average incomes, foreign package holidays have now largely replaced summer coach trips to local seaside resorts
LEISURE	Many visit the local pub
E Urban Intelligence	
WEALTH	Ranked 6/11, many still in further education while others starting out as full-time workers, often high salaried
AGE / LIFE STAGE	Aged 24 to 34. Mostly single not yet ready to make permanent commitments
MEDIA PREFERENCES	Broadsheet press, current affairs and environmental magazines, heavy internet usage
HOLIDAYS	Travel agents relied on heavily, especially in summer months
LEISURE	Arts and entertainment, cinema, plays and concerts or visiting exhibitions
F Welfare Borderline	
WEALTH	Ranked 11/11, on low incomes and state benefits, high deprivation
AGE / LIFE STAGE	Aged 25 to 34, many with young children
MEDIA PREFERENCES	Heavy viewers of commercial TV, The Mirror and The Sun are favoured newspapers although unlikely to purchase on a daily basis
HOLIDAYS	Holidays are infrequent
LEISURE	Leisure time spent in bars and clubs, high expenditure on betting, smoking and the lottery
G Municipal Dependency	
WEALTH	Ranked 10/11, low incomes, reliant on council housing
AGE / LIFE STAGE	Aged 24 to 44, families or lone parents
MEDIA PREFERENCES	Heavy commercial TV viewing, low newspaper readership although if read, it's likely to be The Mirror or The Sun and News of the World on Sundays
HOLIDAYS	Infrequent
LEISURE	Newspaper puzzles, competitions, bingo, betting, lottery
H Blue Collar Enterprise	
WEALTH	Ranked 8/11 living in ex council housing often having exercised their right to buy, increasing confidence to manage own affairs without the help of the state

AGE / LIFE STAGE	Aged 45 to 64, mainly middle aged couples with dependent children
MEDIA PREFERENCES	Heavy TV viewers, read mid-market papers such as The Daily Mail, The Express or The Sun, enjoy practical magazines about home and garden, cars etc
HOLIDAYS	Package holidays abroad, self-catering holidays in scenic regions of the UK also popular
LEISURE	Enjoy eating out with the family at country pubs and restaurants, interest in gardening
I Twilight Subsistence	
WEALTH	Ranked 9/11, low incomes and savings, state benefits
AGE / LIFE STAGE	Aged 65 to 84, later stages of previously independent lives and now require support of social services
MEDIA PREFERENCES	Heavy TV watchers, very low newspaper readership
HOLIDAYS	Few purchase holidays
LEISURE	Bingo, domino and cards
J Grey Perspectives	
WEALTH	Ranked 5/11, significant capital, retained financial independence
AGE / LIFE STAGE	Aged 65 to 84, mostly retired
MEDIA PREFERENCES	Watch a lot of TV although more BBC than commercial viewing, few subscribe to cable or Sky, favour The Daily Telegraph or The Express. Popular magazines are those focused on heritage and environment
HOLIDAYS	Frequent visits to friends and relatives often involving coach or rail travel
LEISURE	Frequent theatre and concert hall goers, often involved in/attend local operatic or music societies.
K Rural Isolation	
WEALTH	Ranked 3/11, high value assets but fairly low disposable incomes. High proportion in self-employment.
AGE / LIFE STAGE	45 to 54, married couples with no children or empty nesters escaping the suburbs
MEDIA PREFERENCES	Hard to read group – commercial TV viewing lighter than average, poor exposure to alternative media channels such as posters, door to door and commercial radio. May read The Daily Mail or The Daily Telegraph
HOLIDAYS	Self-catering is most popular type of holiday, may also take weekend/short breaks
LEISURE	Leisure time spent outside the home in walking, fishing and gardening, enthusiastic car boot goers, considerable antiques knowledge, reading and crosswords