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Destination North East England

Quarterly Research Report

Spring 2025

destinationnortheastengland.co.uk info@dnee.co.uk

Contents

Executive summary

Key takeaways from this edition:

North East England welcomed 68.44 million visitors in 2024, down 1% on 2023 due to a reduction in day visits.

The region hosted 7.82 million overnight visitors. Overnight visitor numbers have grown by 4.1% since 2019.

Tourism is worth £6.6bn to the regional economy and supports almost 63,000 jobs.

Nationally, domestic tourism day visits volume decreased in 2024 by 12% vs 2023 after an 8% year-on-year increase in 2023.

Those in the “Family” life stage are taking more child-free days out.

In 2024, the North East attracted 18% of English overnight visits from South Scotland and 8% of all English overnight visits from Scotland.

North East attractions reported a 3% increase in admissions (mainly attributed to paid attractions) - still 34% down on 2019.

77% of attractions report having one or more strategies in place to embed regenerative tourism / sustainable practices.

Extending a business events trip to include leisure days is much more common among overseas delegates than UK delegates. 33% of European delegates and 56% of delegates from outside Europe extend their trip.

Introduction

Welcome to the spring 2025 edition of Destination North East England's quarterly research report.

Drawing from a range of sources, this report provides an overview of the latest data and reports relevant to the North East's visitor economy, identifying challenges, opportunities and trends to inform visitor economy stakeholders.

This edition begins with a summary of the latest measures of volume and value of tourism for the North East's economy plus latest feedback from North East businesses.

The report then looks ahead to key upcoming events, openings and investments, before providing a roundup of recent industry publications including new delegate spend data, visitor attractions trends and results of the 2024 Great Britain Tourism Survey.

We'd love to hear what you think about the report. Please email research@ngi.org.uk with any comments or suggestions.

National context: UK Industrial Strategy

Recent national policy announcements offer important context for tourism and hospitality businesses in the North East.

UK Government Industrial Strategy: Published in June 2025, the Industrial Strategy is a 10-year plan for long-term economic growth. It aims to drive productivity, boost investment, improve regional balance, and support key sectors through innovation, infrastructure and skills.

Priority growth sectors identified in the industrial strategy include; Advanced Manufacturing, Clean Energy Industries, Creative Industries, Defence, Digital & Technologies, Financial Services, Life Sciences, and Professional & Business Services.

Key pillars relevant to the visitor economy:

- **Creative Industries:** Recognised as a core growth sector, with dedicated funding for regional clusters, skills development, and export potential. There are opportunities to align tourism, events, hospitality and cultural experiences with support for creative hubs and talent development.
- **Clean Energy:** Significant investment in sustainable infrastructure and clean energy - aligning with the region's regenerative tourism ambitions.
- **Skills and Business Support:** Emphasis on digital skills, workforce resilience and apprenticeships in key service sectors – relevant to the regions ambition's for supporting people into hospitality, events and tourism employment.
- **Trade and Investment:** Strategy includes increased support for UK exports and inward investment, including through international events and conventions. Business events, cultural exports and tourism are well positioned to contribute to the UK's soft power and global reach.

Industry response to UK Industrial Strategy

Industry bodies broadly welcomed the long-term ambition of the strategy but raised concerns about the lack of direct recognition for tourism, hospitality, and leisure - sectors that are major employers and contributors to regional growth.

- **UK Hospitality** highlighted that the strategy risks 'leaving behind 70% of the economy,' urging government to include foundational sectors like hospitality and tourism in future investment and energy support plans.
- The **Tourism Alliance** and **UKinbound** both called for tourism to be recognised as a growth sector in its own right - particularly given its role in international trade, soft power and regional growth.

These responses reinforce the case for continued advocacy to ensure the visitor economy is reflected in future cluster development, workforce support, and Industrial Strategy Zone planning.

Volume and value of visitor economy

North East England saw overnight visitors grow in 2024 according to the latest STEAM results, with a 1% drop in overall visitor numbers due to a reduction in day visits.

The region's visitor economy is **now worth over £6.6bn**, this represents modest growth on 2023 estimates once inflation is accounted for.

Despite difficult trading conditions for tourism and hospitality businesses, the sector continues to support a large number of jobs with **over 62,800 people employed** in roles across the industry.

Key measures of volume and value

	Number of visitors 2024 (m)	Total Economic Impact (£)	Employment Supported (FTE)
Newcastle	10.65	£1,536,000,000	13,726
Gateshead	6.4	£773,370,000	7,147
Sunderland	8.1	£620,290,000	5,684
South Tyneside	5.893	£429,390,000	3,886
North Tyneside	5.379	£455,420,000	4.043
Durham	21.56	£1,380,000,000	13,795
Northumberland	10.46	£1,443,000,000	14,545
North East England	68.44	£6,637,470,000	62,826

Overnight visitor growth

7.821m overnight visitors came to the region in 2024 – meaning 11.4% of visitors stayed overnight. Overnight visits were up across all seven local authority areas, with an average **growth of 1.6%**.

Driving factors behind this uplift include sales and marketing activity in international markets, recent investment in new attractions (particularly in Durham and Northumberland) and a bumper year for business events and conferences.

The majority of areas in the North East saw their 2024 overnight visitor numbers surpass 2019 levels.

	Overnight visitors 2024 (m)	Overnight visitors 2023 (m)	% change	Overnight visitors 2019 (m)	% change
Newcastle	1.789	1.745	**2.5%**	1.599	**11.9%**
Gateshead	0.692	0.679	**1.9%**	0.665	**4.1%**
Sunderland	0.840	0.826	**1.7%**	0.776	**8.2%**
South Tyneside	0.420	0.415	**1.2%**	0.41	**2.4%**
North Tyneside	0.577	0.570	**1.2%**	0.524	**10.1%**
Durham	1.640	1.611	**1.8%**	1.611	**1.8%**
Northumberland	1.863	1.855	**0.4%**	1.928	**-3.4%**
North East England	7.821	7.701	**1.6%**	7.513	**4.1%**

Day visit market

In line with national trends (see page 14) day visits were down in 2024 in some parts of the region.

Durham and Northumberland have bucked this trend, in part due to recent investment in new attractions e.g. The Auckland Project and Ad Gefrin. Major new developments at the region's most visited attraction Beamish Museum have also helped Durham reach day visitor figures beyond pre-pandemic levels in 2024.

Whilst the industry has plenty of reasons to celebrate, the mixed picture overall demonstrates the need for continued investment and the development of new products and experiences across the visitor economy. We'll see on the following slides more reasons why this is important.

	Day visitors 2024 (m)	Day visitors 2023 (m)	% change	Day visitors 2019 (m)	% change
Newcastle	8.856	9.279	**-4.6%**	10.17	**-12.9%**
Gateshead	5.708	6.191	**-7.8%**	6.79	**-15.9%**
Sunderland	7.259	7.921	**-8.4%**	8.72	**-16.7%**
South Tyneside	5.473	6.045	**-9.5%**	6.69	**-18.2%**
North Tyneside	4.802	5.319	**-9.7%**	5.844	**-17.8%**
Durham	19.930	18.540	**7.5%**	18.52	**7.6%**
Northumberland	8.601	8.261	**4.1%**	8.756	**-1.8%**
North East England	60.629	61.556	**-1.5%**	65.488	**-7.4%**

You can read more about the 2024 STEAM results on our website.

Latest business feedback

On behalf of Destination North East England, NewcastleGateshead Initiative collects insights and feedback (via a survey and roundtable discussions) from local businesses regarding performance, challenges and concerns.

Most recent survey results tell us that inflation, increased operating costs, staffing (recruitment & retention) and cost of living remain challenges for the majority of visitor economy businesses across the region.

Also this quarter, some of Newcastle's largest hotels have reported a significant dip in overall performance, one observing that May especially saw a large drop vs 2024.

Conditions continue to be tough for visitor economy businesses with a range of factors at play.

- From the domestic sentiment tracker, we know that financial concerns including the cost of living are limiting how many trips people in the UK can take, and we see those effects in national trends explored on pages 14-17.
- We see changes in behaviour such as a move away from drinking culture within younger generations and a shift to day-time club nights for over-30s looking to avoid costs associated with late nights out, such as taxis or hotel stays.
- There's been a downturn in government travel nationally and locally lack of ticket availability for Newcastle United matches is limiting tourism opportunities associated with the games.

New and recent partnership working, such as a research commission by Newcastle Gateshead Cultural Venues, Sunderland's Seafront BID, and the NewcastleGateshead Weekend Taskforce, is attempting to tackle some of these challenges collaboratively, addressing questions like how to raise awareness of what's on in our destinations, how to appeal to families with a broad range of ages, and how to maximise the opportunities that Premier League football in Sunderland and a minimum of four Champions League matches in Newcastle bring.

During these challenging times, if you'd like to call upon expert advice in business management, North East businesses can access the North East Growth Hub and make an appointment to speak to a business advisor.

Recent investments

The visitor economy in the North East has seen some exciting openings and investments in spring 2025.

Historic, elegant, 48-room **Bailiffgate Hotel** has now opened in Alnwick.

Visitors to **Beamish** can now spend a night at the museum with the launch of its first overnight accommodation. Guests can stay in Georgian-style holiday cottages in the museum's stunning 1820s landscape, in renovated original buildings.

You no longer have to go to Tennessee to get a country music fix, as Nashville has arrived in Newcastle with the opening of the city's first ever dedicated country music bar **Ruby Rae's**.

Taking over the terrace space at the former By the River Brew Co. site, **Summer on the Southside** has arrived bringing together the best in street food, craft beer, cocktails and fresh coffee for the ultimate laid-back hangout.

Fabulous five-star hotel **Gotham**, **Lane7's new games venue** at The Gate and social darts venue **Flight Club** are also set to open in Newcastle this summer.

The fantastical **Upside Down House** opened at Metrocentre.

Some well-loved visitor economy businesses have also announced their closure this quarter, including Horticulture, Horticulture Coastal, El Guapo, Prohibition Cabaret Bar, The Empress, Leila Lilly's, Maple Patisserie and Fork in the Rose.

Future investments

We've also seen some exciting announcements about new visitor economy investments, including:

EasyJet is to open a new base at Newcastle Airport. The three-aircraft base is set to open in March 2026, with 130 jobs created, including pilots, crew and engineers.

The UK's first ever immersive PEPPA PIG experience – **PEPPA PIG: SURPRISE PARTY** – is due to open at Metrocentre in the autumn.

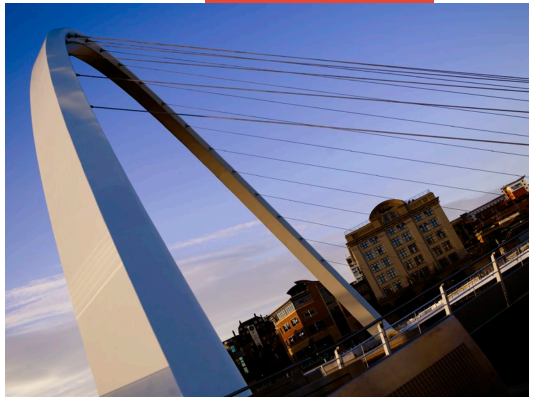
In Sunderland, SAFC have announced a "seven-figure" investment at Academy of Light and **Stadium of Light** which will include the most extensive internal refurbishment of the stadium since it opened in 1997.

Plans to expand **STACK** and make it a permanent fixture on Sunderland's seafront have been given the go-ahead. A "first of its kind" **esports arena** has also had the green light to be built in the city.

The former **Sion Meeting House** in Alnwick is undergoing a major transformation into a 12-bedroom, 80-cover hotel, bar and restaurant, set to open this summer.

Malmaison Newcastle is set to undertake a £2m refurbishment project on its 122 bedrooms, to be completed in autumn.

Project Padel has won approval for three outdoor courts in Stephenson Quarter in Newcastle while plans have been lodged to convert the former Federation Brewery site in Gateshead into a three-story **golf and entertainment complex**.



Top image © Simon Williams / Newcastle Airport

Upcoming events

A look ahead at festivals and events set to bring visitors to the North East in spring and summer 2025.

- **Durham Miners' Gala**, 12 Jul - Held on the 2nd Saturday of July in Durham City since 1871, with more than 200,000 people marching to celebrate trade union and community values.
- **Mouth of the Tyne Festival**, 10-13 Jul - Featuring headliners UB40, Ministry of Sound Classical, Elbow and Kenny Thomas live at Tynemouth Priory & Castle.
- **Newcastle Pride '25**, 19-20 Jul – Newcastle Pride is back with a city-wide takeover including a Pride Fringe getting underway in June. Sunderland, South Tyneside and Gateshead will also be celebrating Pride throughout June, July and August respectively.
- **Women's Rugby World Cup 2025**, 22 Aug - Stadium of Light will host the opening match of the tournament – No.1 ranked England v USA.
- **Lindisfarne Festival**, 28-31 Aug - The 10th anniversary edition of the popular festival will arrive at Beal Farm this summer.
- **AJ Bell Great North Run**, 7 Sep - 60,000 participants are set to tackle the famous half marathon this summer.

Great Britain domestic day trips 2024

The Great Britain Tourism Survey (GBTS) is a national consumer survey which includes two core domestic modules, overnight trips and day visits. The 2024 report provides context to trends observed in the North East (see pages 8-10) and provides insights into behavioural trends we can leverage.

- Domestic tourism day visits volume decreased in 2024 by 12% vs 2023 after an 8% year-on-year increase in 2023.
- Spend on tourism day visits in England in 2024 rose by 6% in 2024 to £48.4 billion, following a 15% year-on-year increase in 2023. Inflation accounts for some of this uplift. A trend within the “Family” life stage also contributed.
- The “Family” life stage saw the biggest increase in spend in 2024 (+17%), when compared to 2023, as they took more solo day visits without children present. Day visits without children have a higher average spend (£61 per visit per person) than those with children (£37 per visit per person, including children).
- Visits to seaside and coastal destinations increased in 2024, especially in Q1, as “Younger Independents” increased their visits to this destination type.
- Visiting friends or relatives, “food and drink, a night out or speciality shopping” and visitor attractions were the top activities undertaken in 2024, which is unchanged since 2023.
- Visits that included a wellbeing experience showed a continuous increase trend from 2022 to 2024, and had the highest average spend (per visit per person) of all activities at £124 per visit in 2024 (vs £52 on an average day visit).

There was a strong appetite for solo or couples, child-free days out in 2024. These parties were higher spenders and preferred more expensive activities e.g. spa days, eating and drinking and speciality shopping. Destinations can appeal to this market with blogs and itineraries highlighting where to go and what to do on child-free days out.

Read more about GBTS day trips results for 2024.

Great Britain domestic overnight trips 2024

Headline findings from GBTS domestic overnight trips 2024 report:

- Domestic overnight trips volume decreased by 10% vs 2023, by 14% vs 2022. Q1 and Q4 saw sharpest declines vs 2023.
- Spend on overnight trips in England in 2024 was 5% above 2023 and 3% above 2022.
- Average spend per night (per person) in Britain continued an increasing trend from £85 in 2022 to £92 in 2023 and reaching £107 in 2024 (up 26% since 2022). "Family" life stage contributed most to the increase, with growing share of trips (+2pp) as well as spending considerably more per trip per person in 2024, particularly on package holidays.
- In England, package spend remained one of the top categories of spend in 2024, and experienced an uplift, from 16% in 2023 to 18% in 2024. Those in the "Family" life stage and "Older Independents" were fuelling this increase.
- Large towns and cities continued to be the most popular destinations in England and further increased in popularity in 2024, from 44% share in 2022, 45% in 2023 to 46% in 2024 – at the expense of countryside / village destinations.

Great Britain domestic overnight trips 2024 cont.

Headline findings from GBTS domestic overnight trips 2024 report:

- As in previous years, sightseeing and "food and drink, a night out or speciality shopping" were the most popular trip activities in England; however, both were in 2024 below 2023 and 2022 levels.
    - ➢ A reduction in overnight visitors taking nights out within their trip is in line with cultural trends for younger generations and the observation that many visitors aged 30+ are opting for daytime clubbing and an early night rather than making a whole night of it.
- Accommodation booking lead times reduced, from 30% of trips being booked 2+ months in advance in 2022, 28% in 2023 to 26% in 2024.
- 28% of overnight trips in 2024 were made by solo travellers, a 3 percentage point increase since 2023 (+4pp since 2022). As in 2023 and 2022, the majority of trip parties did not include a child under 16 (72%, +2pp since 2023).

The domestic solo travellers market is growing. Visitor economy businesses can attract this market by developing products and services designed for this traveller type, such as events and spaces designed to help solo travellers meet with, speak to and share meals with other solo travellers.

How big a share of visits does the North East attract from around the UK?

In 2024, the North East attracted:

- 18% of English overnight visits from South Scotland
- 9% of English overnight visits from East Scotland
- 7% of English overnight visits from North Scotland
- 7% of English overnight visits from West Scotland
- (8% of English overnight total visits from Scotland)
- 5% of English overnight visits from Yorkshire
- 4% of English overnight visits from the North West
- 3% of English overnight visits from North Wales

Factors including awareness of offer, travel time, ease of travel and perception of distance all play a part in share of visits.

Visitor Attractions Trends in England 2024

VisitEngland's annual survey looks at trends in visitor numbers and profiles, entrance fees, employment, sustainability, accessibility by public transport, funding, and marketing and communication. Here we pull out some of the key trends for 2024. The full report can be downloaded here.

Admission

- Attractions in England reported a 1.4% increase in the volume of visits from 2023 to 2024; however, this is still 27% below 2019 levels.
- **North East attractions had a 3% increase in admissions** – mainly attributed to paid attractions – still **34% down on 2019**.
- Nationally, **admissions growth is driven by overseas visits** (+6% on 2023) whilst sites reported a 1% decrease in domestic visits.
- Actions that boosted visits among highest performing attractions included increased opening times; popular / temporary / new exhibitions; enhanced facilities – exhibition spaces, play areas, catering facilities; and targeted / increased social media presence.

Employment

- Looking at year-on-year net changes in staff numbers, there were **increases in numbers of all types of staff** working at England attractions in 2024.
- **Unpaid volunteers saw the biggest increase** (net:+24%), followed by
- apprenticeships (net:+17%). Net change for permanent and seasonal staff was a more modest net:+4% for each.
- With pressure on budgets due to wage inflation, unpaid volunteers are becoming even more essential to the running of many attraction categories.

Accessibility and sustainability

- 45% of attractions invested in enhancements to accessibility provision within the last 12 months.
- 77% of attractions report having one or more strategies in place to embed regenerative tourism / sustainable practices.
- **Attractions in London, the North West, North East and Yorkshire & Humber are most likely to have strategies in place to embed regenerative tourism** / sustainable practices.
- 39% of attractions measure their carbon footprint.
- 32% of sites invested in carbon reduction measures in 2024.

Business Events Delegate Survey

VisitBritain commissioned an extensive delegate survey in 2024, conducting 1,184 interviews at 80 events around Britain (6 of the events were in Newcastle / Gateshead). The results underline why business events is a key focus for Destination North East England and why international association conferences are a priority. Headline findings include:

- Average delegate spend at business events in the UK has risen well above inflation since 2017, primarily due to longer stays. **More delegates are now staying overnight** (73% vs 62% in 2017) while average length of stay among delegates staying overnight has increased from 3.0 nights to 4.3.
- **Delegates from outside Europe spend £1,824 on average**, compared to £872 for delegates from within Europe, and £328 for UK delegates.
- **Extending a trip increases spend by a factor of 2.5**. Among those who extend their trip for leisure, the average spend is £1,760. Without the extension, the same delegates would have spent £714 on average.
- Extensions are much more common among overseas delegates than UK delegates. A third (33%) of European delegates and **56% of delegates from outside Europe extend their trip**.
- Average spend per trip varies significantly by event type. The average trip spend for association events is £854; average for corporate events is £651; average for exhibitions is £326; average spend for incentive trips is £2,113.
- For many visitors, attending a conference or event is their first engagement with a destination. 62% of event delegates say they 'definitely' hope to return to the city / region for leisure, 60% say 'definitely' hope to return to attend another business event and 47% say 'definitely' hope to return to invest or grow business relationships.

Visitor economy businesses can capitalise on the opportunities business events bring by offering shoulder night deals when working with NewcastleGateshead Convention Bureau on accommodation booking, and providing eye-catching deals when the bureau is collating delegate offers at the start of each year.

The Social Value of Tourism report

A new report by VisitEngland aims to quantify some of the social impacts of tourism.

The report highlights how tourism improves access to cultural amenities, green spaces, and local businesses — enhancing the daily quality of life for residents and visitors.

It found a clear appetite within the British public to travel in a regenerative way that is both good for communities and the environment.

The report acknowledges the visitor economy offers a range of employment opportunities and diverse entry routes, including for young people and those with varied educational backgrounds.

Although focused on benefits for residents, the report also looks at benefits to visitors e.g. feeling healthier, closer to nature, more connected etc.

Some key findings:

- Over half of host communities' residents consistently report living within 5 miles of cultural institutions, heritage sites, waterways, beaches, and other aspects of nature, with non-host communities consistently reporting longer distances.
- 58% of those in host communities feel connected to their community, while only 35% in non-host communities feel that community connection
- Nearly 60% of the public say that when they travel, they try to leave the place better than they found it.
- 72% of the British public are proud that visitors come to the UK from around the world, and that goes up to 79% of people living in host communities.

The full report provides further useful stats and narrative for funding bids and grant applications.

UK Music: Hometown Glory 2025

UK music tourists spent a record £10bn in 2024 – a 26% increase on the 2023 total spend of £8bn, according to UK Music's Hometown Glory 2025 report.

The report also explore a whole range of reasons why music is such a key part of the visitor economy as well as the challenges and opportunities within music tourism:

- HALF of UK adults are more likely to spend money in a venue that has high-quality live music.
- 62% of UK adults agree music, nightlife, and music spaces should be part of how we bring life back to the high street.
- HALF of UK adults say they would be more likely to go to music events if public transport matched event times better.
- 4 IN 10 UK adults are more likely to go out in the evening if there are live music events in the area.
- 6 IN 10 UK adults agree that empty or underused spaces in their town should be opened up for music and cultural use.

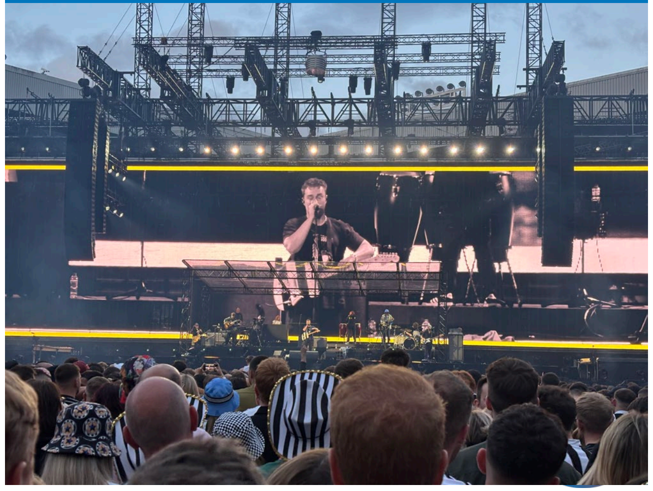
Destination North East England is excited to be working with Generator - the North East's leading music development agency – to explore opportunities to support and grow music tourism in the North East, and to support their partnership with the Mercury Prize when the awards ceremony takes place in Newcastle in October.

Access the full report, including practical steps for what local councils, LVEPs and BIDs can do to support music tourism.

Local picture:

According to the UK Music report, music brought **714,000** visitors to the region last year, spending **£364m** and supporting **3,080** jobs.

Local estimates suggest the trio of Sam Fender concerts at St James' Park in June this year helped boost the local economy by approximately **£16.5m**.



Research calendar 2025

January

DNEE 2025 Travel trends blog

March

DNEE North East England Quarterly Research Report

Great Britain domestic day trips 2024 report

Great Britain domestic overnight trips 2024 report

May

The Social Value of Tourism report

June

North East England STEAM data 2024 release

Business Events Delegate Survey report

Visitor Attractions Trends in England 2024

DNEE North East England Quarterly Research Report

July

North East England Visitor Economy Fact File – latest update

UK inbound volume and value 2024 (IPS)

September

DNEE North East England Quarterly Research Report

October

North East England Visitor Economy Fact File – latest update

November

DNEE North East England Quarterly Research Report

December

Global Destination Sustainability Index – annual results report for North East England destinations

New awards and accolades

PR coverage helping us all raise the profile of the region’s visitor offer.

Café Laing features in Guardian list of best museum cafés

Mumsnet names Northumberland best UK destination for family holiday

Sunderland featured in new book Sh**ty Breaks: A Celebration of Unsung Cities | The Telegraph

Newcastle named most sustainable city to visit in England, new research reveals

Seaham named in top 10 TV tourism list

VisitEngland Awards for Excellence winners:

- Gold for Ad Gefrin, New Tourism Business of the Year.
- Silver for Seaham Hall, Small Hotel of the Year.
- Silver for Escape Key’s Caitlin Brown, Unsung Hero Award.
- Bronze for Glasshouse International Centre for Music, Business Events Venue of the Year.
- Bronze for Battlesteads, Ethical, Responsible and Sustainable Tourism Award.

Recommendations

Capitalise on the opportunities business events bring - Offer shoulder night deals when working with NewcastleGateshead Convention Bureau on accommodation booking, and providing eye-catching deals when the bureau is collating delegate offers at the start of each year.

Consider activity to attract the growing domestic solo travellers market - Develop products and services designed for this traveller type, such as events and spaces designed to help solo travellers meet with, speak to and share meals with other solo travellers.

Develop / tailor marketing resources for "child-free days out" - Destinations can appeal to this market with blogs and itineraries highlighting where to go and what to do on child-free days out. Visitor economy visitors can highlight aspects of their offer that fit with these day visits.

Find out more about regenerative tourism and sustainable practices – Check out The Regenerative Tourism Guide from VisitEngland.

Access business advice when needed - For expert advice in business management, North East businesses can access the North East Growth Hub and make an appointment to speak to a business advisor.

Get involved

Look out for future visitor economy business surveys and please take a few minutes to tell us how things are going and about any concerns you have.

We gather this evidence and data on the current performance and challenges faced by the region's tourism and hospitality businesses, in order to inform our work and our conversations with policy makers at a local, regional, and national level.

We'd love to hear what you think about the report. Please email research@ngi.org.uk with any comments or suggestions.