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Destination
North East England

Quarterly Research Report

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Executive summary

Key takeaways from this edition:

French, German and Dutch 'experience seekers' are the target audiences for North East England's current international tourism campaigns.

French 'experience seekers' top activities are exploring local food and drink; experiencing coastal places and scenery; participating in action and adventure experiences; and exploring history and heritage.

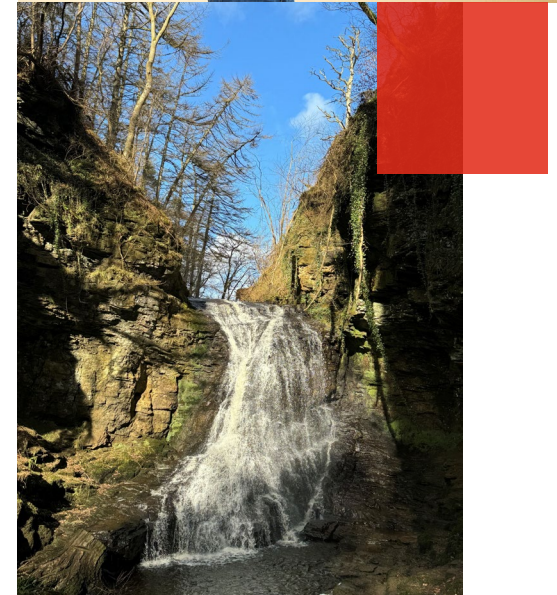
German 'experience seekers' top activities are exploring local food and drink; visiting famous / iconic tourist attractions and places; experiencing coastal places and scenery; and experiencing city life.

Ahead of official volume and value figures for 2024, indicators suggest a healthy overnight market and signs that day visitor figures might not be so positive.

One-off, new and special occasion tourism and hospitality products are still doing well. Everyday business is being noticeably affected by the economic climate.

Consumer trends for 2025 include noctourism, catering for neurodiversity, sports tourism and wellness.

UK consumers are still looking to save money on domestic trips due to financial pressures.



Introduction

Welcome to the fourth 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 includes an overview of the international markets being targeted by current regional campaigns, indicators of the region's 2024 performance, and latest feedback from North East businesses.

The report then looks ahead to key upcoming events, openings and investments, before providing a roundup of other recent industry publications and trends predictions for 2025.

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



International market profiles

In the first few months of 2025, Destination North East England is working with partners* to deliver campaigns in two international markets – **Germany** plus the Netherlands via the DFDS ferry route and the Eurowings Berlin route, and **France** via the easyJet Paris route.

The markets were selected for a combination of:

- Connectivity – direct routes over short distances.
- Product / market fit – we know higher spending segments of these markets are interested in the kinds of breaks the North East excels at.
- Alignment with VisitBritain's target markets.

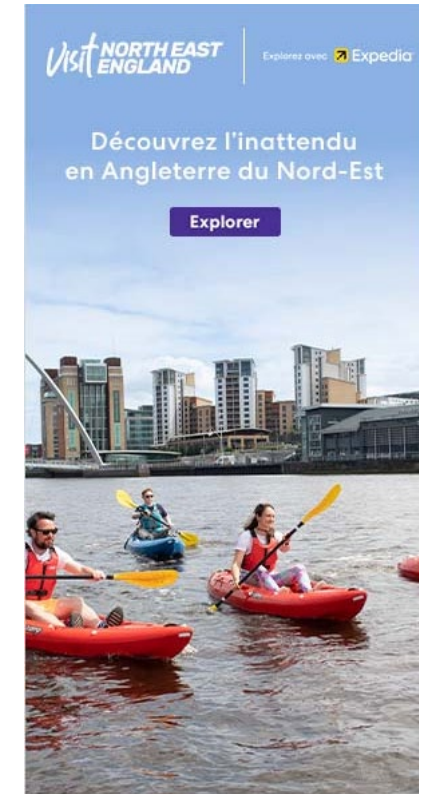
Alignment with VisitBritain allowed us to secure significant funding for our Germany / Netherlands campaign with DFDS, piggyback on their partnership with Expedia for our campaign targeting French and German air routes, and access relevant market insights from the VisitBritain team.

Both campaigns are targeting 'experience seekers' and the following two slides explore key features of this segment in Germany and France – taken from VisitBritain's extensive market segmentation work.

The market profiles have informed campaign messaging and targeting and can inspire and inform your messages and activity to attract German and French visitors to book with you**.

* In-region partners for the France campaign: Newcastle International Airport, NewcastleGateshead Initiative, Visit County Durham, Visit Northumberland and Sunderland City Council.

** See p20 for links to resources to help you attract and welcome international visitors.



[Visit Expedia campaign page](#) (France)

[Visit DFDS campaign page](#) (Germany)



German 'experience seekers'



Who are they?

"Experience Seekers want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people."

- Over 50% travel with their partner / spouse.
- 1 in 4 travel with kids.
- German 'experience seekers' spend more than the average German tourist.

Find out more about the [German market](#) with VisitBritain market profiles.

Top drivers of destination choice	Top activity preferences
Offers good value for money (92%)	Explore local food and beverage specialities (67%)
Is a welcoming place to visit (81%)	Visit famous / iconic tourist attractions and places (62%)
Offers lots of different experiences in one destination (79%)	Experience coastal places and scenery (61%)
It's easy to get around once there (79%)	Experience city life (61%)
Has experiences I can't have anywhere else (78%)	Enjoy fine dining experiences (59%)



French 'experience seekers'



Who are they?

"Experience Seekers want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people."

- 2 in 3 travel with their partner / spouse.
- 1 in 4 travel with kids.
- French 'experience seekers' spend slightly more than the average French tourist.

Find out more about the [French market](#) with VisitBritain market profiles.

Top drivers of destination choice	Top activity preferences
Offers good value for money (85%)	Explore local food and beverage specialities (75%)
There is beautiful coast and countryside to explore (84%)	Experience coastal places and scenery (65%)
Is a welcoming place to visit (83%)	Participate in action and adventure experiences (62%)
It's easy to get around once there (83%)	Explore history and heritage (historical sites, architecture) (62%)
It has surprising and unexpected experiences (82%)	Visit parks and gardens (61%)



2024 performance – context

	2023	2022	2019	% change on 2022	% change on 2019
Number of visitors	69.14m	65.59m	72.99m	+5%	-5%
Economic impact	£6.1Bn	£6.07Bn	£6.44Bn	+0.6%	-5%
Jobs (FTE)	63,000	58,449	63,070	+8%	+0%
Day visitors	61.56m	58.11m	65.48m	+6%	-6%
Overnight visitors	7.58m	7.48m	7.51m	+1.5%	+1%

In May we will receive official estimates of the volume and value of tourism in the North East for 2024 and will be hoping to see growth across the key metrics we see in the table.

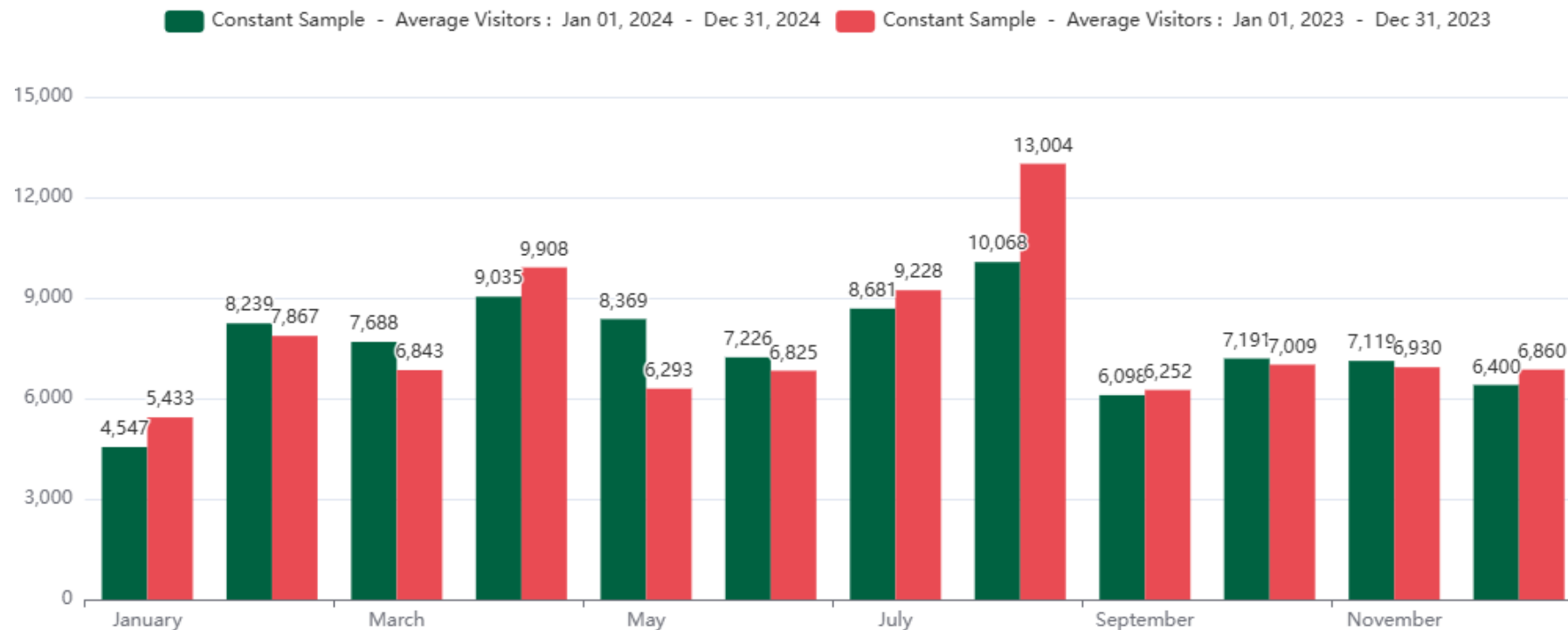
When we received our 2023 report, it was very encouraging to see that overnight visitor numbers had more than recovered from the impact of the pandemic. Up 1% regionally, Newcastle welcomed an impressive 6.5% more overnight visitors than it did in 2019.

We also found that the day visitor market hadn't yet returned to pre-pandemic levels. We see on the following slides some early indications of 2024 performance and how attracting day visitors continues to be a challenge regionally and nationally.

**Data source: North East England STEAM reports 2023.
2019 and 2022 economic impact figures adjusted for inflation.**



2024 performance – attractions

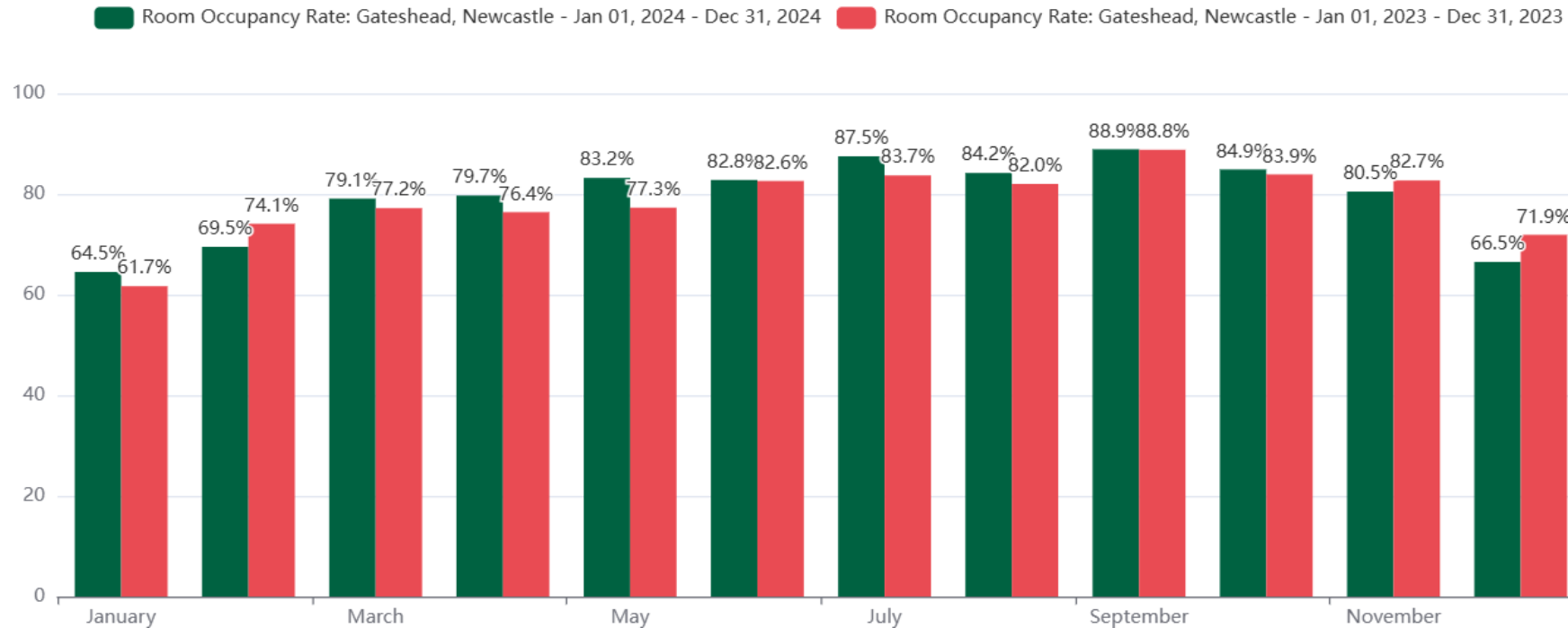


T-Stats collects data from a selection of attractions and hotels around the region and, being collected monthly, provides an early indication of 2024 performance.

We see that August 2023 was much better for the sample attractions than August 2024. If we look across the whole year, visits to attractions were 2% down.



2024 performance – hotels



The majority of hotels inputting data into T-Stats are in Newcastle and Gateshead so above we see a comparison of 2024 occupancy with 2023 levels in NewcastleGateshead.

Looking at the whole year, 2024 looks just about on par for 2023 with regards to occupancy (78.7% versus 78.6%) and since we know 2023 was a good year for overnight visits in NewcastleGateshead, this is a reason to be optimistic.



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.

Key themes from last 3 months:

- Many businesses now reporting reduced leisure visitor figures and citing cost of living as a major factor (international competition due to poor weather here also cited).
- One off (e.g. events), new and special occasion tourism and hospitality products are still doing well. Everyday business is being noticeably affected by the economic climate.
- Many of the major Newcastle city centre hotels had a successful 2024, and 2025 has started positively too.
- Autumn budget announcements including a rise in National Minimum Wage and increased employers' contribution to National Insurance will have a significant impact from April. Expected responses include:
 - Reducing the number of seasonal workers (potentially impacting customer experience).
 - Increasing prices.
 - Having to increase fundraising targets.
 - Reduced opening days.
 - Business closures.

There's no doubt that the current economic climate is tough – for organisations and their customers. 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.



Recent investments

The visitor economy in the North East has seen some exciting openings in winter 2024, including a smorgasbord of new dining options.

Tasting restaurant **FIK** opened in Durham city centre.

New openings in the Metrocentre include retailer **Pavers** and **Kiko Milano**, and **Tomahawk Steakhouse**.

3 Stories Sunderland opened with three floors of bars in a beautiful Georgian building on High Street West.

Crust Social in Tynemouth moved to new premises on Percy Park Road.

Newcastle has added a raft of new dining and drinking options including: **Rudy's Pizza**; **The Magpie**; **Babucho** in Gosforth; **Lockup** in Ouseburn; **Mowgli**; **Dood**; **Wingstop** in Eldon Square; **Pho**; **This is Doner**; **Mother Mercy** in Heaton and Japanese pancake place **Fluffy Fluffy**.

On Newcastle Quayside the brand-new **Dakota Newcastle** boutique hotel is due to open on Saturday 29 March.



Future investments

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

Details of **Freight Island**'s arrival into Eldon Square were announced in February. Inspired by the likes of Coney Island in New York and the famous Tivoli Gardens in Copenhagen, the dining and entertainment space will span an impressive 60,000 square feet.

New details have been announced for **Culture House** at Keel Square in Sunderland, due to open in autumn. A key feature will be The Atrium which will stretch from the ground floor to the roof and include digital screens that can be used for live performance streaming, digital art or immersive storytelling.

The creators of *Kynren – An Epic Tale of England* have unveiled plans for a brand-new historical theme park, **Kynren – The Storied Lands**. Due to open in summer 2026, it's set to be a spectacular daytime attraction within the wider Kynren park in Bishop Auckland.

Plans to create a £170m project aiming to take Newcastle to new heights were unveiled at the world's biggest property conference MIPIM this year. Gainford Group's plans for **New Bridge Street** feature a 29-storey residential tower, alongside a new hotel, new bars and restaurants, creating a new gateway into Newcastle city centre.



Top image: Faulkner Brown Architects / Gainford Group



Upcoming events

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

- **S&DR200 Festival**, 29 Mar–Nov – An international festival across Durham and Tees Valley to mark the 200th anniversary of the Stockton & Darlington Railway.
- **MAGIC WKND**, 3 & 4 May – The summer festival of Rugby League returns to St James' Park – 12 teams, 6 games, 2 days of rugby magic.
- **England v West Indies ODI**, 6 Jun – England men's team are back at the Seat Unique Riverside for a one-day international against West Indies.
- **Sam Fender**, 12, 14 & 15 Jun – Sam is back for three sold-out shows at St James' Park as part of his People Watching Tour.
- **Mouth of the Tyne Festival**, 10–13 Jul – Featuring headliners UB40, Ministry of Sound Classical, Elbow and Kenny Thomas live at Tynemouth Priory & Castle.
- **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**, 28–30 Aug – Armand van Helden, The Waterboys, Jamie Webster, Hawkwind and The Fratellis join the lineup 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.



2025 tourism trends round-up

Noctourism

Exploration of destinations after dark (e.g. night tours, stargazing and night markets) is set to be high up travellers' to-do lists this year. Skyscanner found 28% of UK travellers expressed a desire to stargaze in a dark sky park.

A growing number of tourism experiences are being developed around dark skies in the region. Speak to your LVEP for guidance and pointers if you're looking to create new dark skies experiences and packages.

Neuroinclusivity

Booking.com reported almost half of neurodivergent travellers have had a negative travel experience due to their needs and 50% agree their travel options are limited due to lack of inclusivity.

Focusing on creating environments, services and accommodation that consider the diverse needs of neurodivergent customers, can attract loyal customers from an underserved community. For training and toolkits aimed at making your business more inclusive, sign up to Destination North East England's [Everybody Welcome programme](#).

Explore the trends further in [our blog](#).



2025 tourism trends round-up cont.

Sports tourism

UN Tourism has reported that sports tourism is one of the fastest growing sectors, with an estimated growth rate of 17.5% between 2023 and 2030.

With the North East bidding to be the UK's first Region of Sport and an exciting year of sport coming up (MAGIC WKND, Great North Run, Women's Rugby World Cup, international cricket matches in Durham), it's worth thinking about how you can tie your events and programming in with sports, to help attract growing numbers planning a short break around their favourite sports.



Wellness

According to a recent Accor survey, 31% of Brits have expressed a desire for a wellness retreat weekend in 2025. Searches for 'wellness retreat holidays' are up by 22%.

We're seeing a rising focus on mental and physical wellbeing. Highlighting aspects of your offer with wellness benefits – everything from food to exercise, relaxation and switching off – can increase the attractiveness of your offer with these 'wellbeing weekenders'.



Explore the trends further in [our blog](#).



VisitBritain Domestic Sentiment Tracker

VisitEngland, VisitScotland and Visit Wales have commissioned a Domestic Sentiment Tracker to understand the impact of major events, such as the cost-of-living crisis, on the UK public's intent to take overnight trips, both within the UK and abroad. This includes a survey to a representative sample of over 1,500 adults aged 16+ in the UK.

Key findings from the February 2024 report include:

- 81% of UK adults are intending to take a UK overnight trip at any point in the next 12 months.
- 33% would prefer a UK holiday over overseas in the next 12 months.
- 25% will reduce the number of UK overnight trips due to the cost-of-living crisis.
- 27% will reduce the number of day trips due to the cost-of-living crisis.

Top barriers to taking an overnight UK trip: rising cost of living, UK weather, rising costs of holidays / leisure.

Of those that will take a UK overnight trip, consumers are planning ways to save money and cut spending. 23% will choose cheaper accommodation; 23% will spend less on eating out; 21% will look for more 'free things' to do.

Consumers taking day trips are also planning to save money. 20% will spend less on eating out; 19% will look for more 'free things' to do; 18% will take fewer day trips.

The message remains the same and clear: UK consumers want to take domestic trips, but they may have to take fewer trips and are looking to spend less. Experiences, attractions, restaurants and accommodation which can demonstrate value, for example in highlighting the wealth of free things to do nearby or multi-night special offers, will boost their appeal to domestic visitors who continue to battle with increases in the cost of living.

The full report can be found at: www.visitbritain.org/research-insights



Research calendar 2025

January

[DNEE 2025 Travel trends blog](#)

DNEE North East England Quarterly Research Report

March

Great Britain domestic day trips 2024 report

Great Britain domestic overnight trips 2024 report

May

North East England STEAM data 2024 release

North East England Visitor Economy Fact File – latest update

UK inbound volume and value 2024 (IPS) release TBC

DNEE North East England Quarterly Research Report

July

Visitor Attractions Trends in England 2024 TBC

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.

Newcastle listed in Conde Nast Traveller's [best UK city breaks to take in 2025](#).

Northumberland National Park features in The Telegraph's [best national parks in Britain review](#).

Northumberland listed in Conde Nast Traveller's [most romantic getaways in the UK](#) list.

Pine awarded number 2 spot in Square Meal's [UK Top 100 restaurants for 2025](#).

Newcastle International Airport wins [Best Airport in Europe award](#) for the two to five million passengers category at the Airport Service Quality Awards.

Pine and Hjem take second and third place accolades in Harden's Best UK Restaurants 2025 guide and [Top 100 list](#).



Recommendations

Resources to help you attract and welcome international visitors

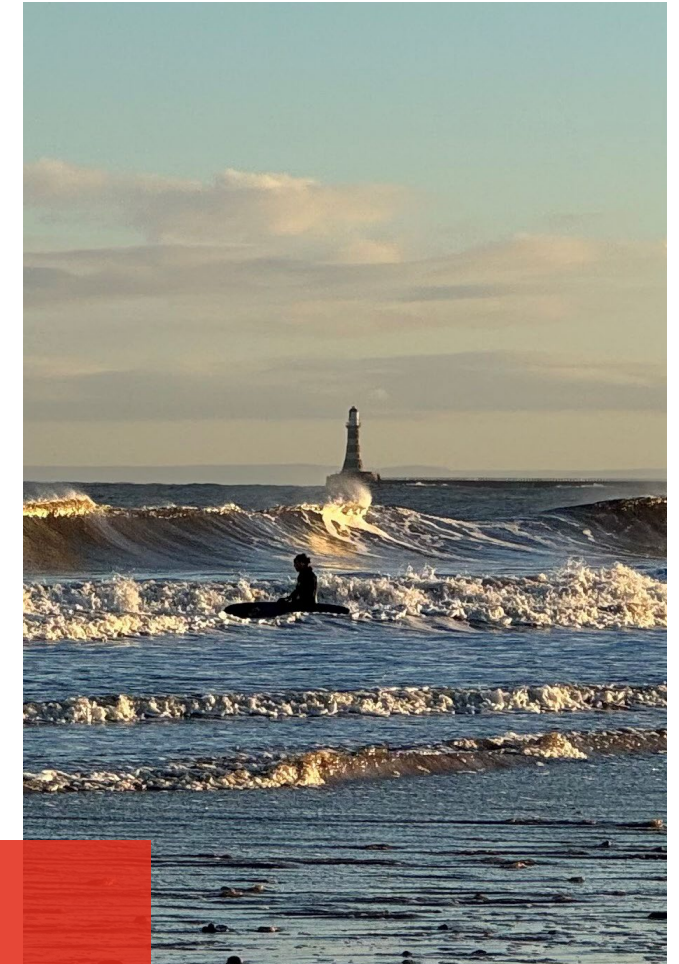
On the Destination North East England website you can [discover essential tips to effectively engage with the travel trade industry](#), attract more tourists and grow your business. You can also find out more about our work with travel trade and [sign up to be Travel Trade Ready](#).

VisitEngland's free Taking England to the World training equips you with the skills and knowledge to reach new international customers. [Find out more](#), download course materials and sign up to hear about upcoming course dates.

Access free resources on welcoming customers with disabilities – Sign up to Destination North East England's [Everybody Welcome](#) programme for support and advice in welcoming the growing number of visitors to the North East – domestic and international – who have impairments and health conditions.

Tailor your products and messages to respond to consumer trends – Respond to consumer trends in sports tourism, noctourism and health and wellbeing (see p15 and 16) by developing new events and products, and / or highlighting existing aspects of your offer which match the trends. Attend local tourism industry events and look to build partnerships to develop new products in tandem with other visitor economy businesses.

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

Our next visitor economy quarterly business survey goes live at the start of April. Look out for the link and please take a few minutes to tell us how things are going and about any concerns you have as the autumn budget announcements come into place.

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.

