

Tour de Yorkshire Economic Impact Study 2016



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1 Introduction

The findings presented are based on data collected by Route Spectator Surveys; that took place over the 3 stages of the Tour de Yorkshire, and data collected via an On-line Spectator Survey. The estimated number of spectators for the 2016 Tour de Yorkshire is 2 million; an increase from the estimated 1.5 million spectators that attended the 2015 Tour de Yorkshire.

Table 1.1 shows the breakdown of the two data collection methods used to gather spectator spending and behaviour.

Table 1.1 Data collection response breakdown

Route Spectator Survey	327 (32% of merged total)	Responses via on route street survey over the three stages of the Tour de Yorkshire
On-line Spectator Survey	704 (68% of merged total)	Responses via social media on-line survey

Table 1.2 shows the economic assessment for the 2016 Tour de Yorkshire; with Table 1.4 showing the economic assessment for the 2015 Tour de Yorkshire. The total accommodation and nonaccommodation revenue is estimated to be £60 million; an increase to the estimated revenue of £50 million for the 2015 Tour de Yorkshire.

Table 1.2 Economic Assessment of the 2016 Tour de Yorkshire

2016 Tour de Yorkshire	
Accommodation revenue	£25,951,797
Non-accommodation revenue	£33,053,034
(report as £60 million)	£59,004,831

Impact of other attendees

This is the spending of the athletes, journalists and officials who were directly involved in the race
£348,000

Total impact £59,352,831 (report as £60 million)

Table 1.3 Economic Assessment of the 2015 Tour de Yorkshire

2015 Tour de Yorkshire	
Accommodation revenue	£20,303,754
Non-accommodation revenue	£29,407,682
(reported as £50 million)	£49,711,436

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Section 2 of this report provides data detailing the demographic profile of spectators. Sections 3, 4 and 5 detail the revenue gained from accommodation and non-accommodation items, by spectator type. Section 6 provides details of spectator behaviour together with their thoughts and feelings of the Tour de Yorkshire.

2 Estimated crowd and spectator profile

It was estimated, over the three stages, that 2.0 million spectators lined the route of the 2016 Tour de Yorkshire. However, many spectators watched the Tour de Yorkshire at more than one stage of the Tour; the average number of stages being 1.34. Therefore, based on the survey data the “unique” number of spectators that watched the Tour de Yorkshire is estimated at 1,491,000.

Table 2a shows the breakdown of the estimated “unique” spectators by type. There are two main spectator types; 1,174,300 of whom live within the host county of Yorkshire and 316,700 of whom are resident elsewhere in the UK or overseas.

Table 2b shows the spectator profile. The findings suggest that 79% of spectators were residents of the host county of Yorkshire and 21% of spectators resided elsewhere in the UK or from overseas; this reflects similar findings to the spectator profile for the 2015 Tour de Yorkshire.

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Table 2a Estimates of Spectator Type based on number of “unique” spectators			Table 2b Spectator Profile (all spectators taking the Route Spectator Survey or the Online Spectator Survey)			
Where resident?	Total number of “unique” spectators	%	Code	Where do the spectators reside?	Number of spectators taking part in the survey	% of spectators that took part in the survey
Yorkshire	1,179,679	79	1	East Riding Council	91	9%
Elsewhere in the UK or overseas	311,321	21	2	Selby Council	43	4%
	1,491,000	100.00	3	York Council	28	3%
			4	Leeds City Council	149	14%
			5	Harrogate Borough Council	61	6%
			6	Craven Council	20	2%
			7	Wakefield Council	43	4%
			8	Doncaster Council	77	7%
			9	Middlesbrough Council	20	2%
			10	Hambleton Council	55	5%
			11	Ryedale Council	30	3%
			12	Scarborough Council	39	4%
			13	elsewhere in Yorkshire	156	15%
			14	elsewhere in the UK and overseas	219	21%*
					1031	

3 Demographics of Spectators

Details of the demographic profile of spectators are shown in Table 3.1 to 3.8; data shows findings excluding and including non-responses. Using data excluding non-responses the demographic profile shows that over 67% of spectators were aged 45 years and over, this is a slightly older crowd than for the 2015 Tour de Yorkshire. Spectators were mainly white with some; though a very small number from black and minority ethnic groups (BME). There were more men (58%) than women (42%) spectators, however, the number of women spectators increased from that observed during the 2015 Tour de Yorkshire where the number of women spectators was 38%. The change in gender

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breakdown may be due to the Women's Race included for the first time in the Tour de Yorkshire 2016. There were some spectators who identified themselves as having a disability.

Table 3.1 Age *excluding* non-responses

Age	Count	%
16-19	10	1%
20-24	32	3%
25-34	94	10%
35-44	178	18%
45-54	287	29%
55-64	246	25%
65+	131	13%
Total responded		100.00%
No response	53	
Total Sample	1031	

Table 3.2 Age *including* non-responses

Age	Count	%
16-19	10	1%
20-24	32	3%
25-34	94	9%
35-44	178	17%
45-54	287	28%
55-64	246	24%
65+	131	13%
No response	53	5%
Total Sample	1031	100.00%

Table 3.3 Gender *excluding* non-responses

Gender	Count	%
Male	564	58%
Female	411	42%
Total responded	975	100%
No Response	56	
Total sample	1031	

The percentage of female spectators has increased to 42% from 38% for the 2015 TdY.

Table 3.4 Gender *including* non-responses

Gender	Count	%
Male	564	55%
Female	411	40%
No Response	56	5%
Total Sample	1031	100%

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Table 3.5 Ethnicity *excluding* non- responses

	Count	%
White	958	99.17%
Mixed	4	0.41%
Asian/British h Asian	3	0.31%
Black/Black British	0	0.00%
Chinese	1	0.10%
other (please specify)	0	0.00%
Total responded	966	100%
No response	65	
Total sample	1031	

The percentage of ethnic white spectators has increased to 99% from 98% for the 2015 TdY.

Table 3.6 Ethnicity *including* non- responses

	Count	%
White	1404	91.59%
Mixed	13	0.85%
Asian/British Asian	6	0.39%
Black/Black British	4	0.26%
Chinese	0	0.00%
other (please specify)	0	0.00%
No response	106	6.91%
Total sample	1031	100.00%

Table 3.7 Disability *excluding* non-responses

	Count	%
Yes	61	6%
No	911	94%
Total responded	972	100.00%
No response	85	
Total sample	1031	

The percentage of disabled spectators was slightly less for the 2015 Td Y with the disabled population being 5%.

Table 3.8 Disability *including* non-responses

	Count	%
Yes	61	6%
No	911	88%
No response	59	9%
Total sample	1031	100.00%

4 Economic Assessment – Spectators resident *elsewhere in the UK or resident overseas*

The economic assessment outlined in this section of the report is based on spectators that completed the Route Spectator Survey or the Online Spectator Survey but were non-residents of the host county of Yorkshire; therefore they were resident either *elsewhere in the UK* or resident *overseas*. The economic assessment includes spectators that specifically came to watch the Tour de Yorkshire; these spectators will be known as Tour de Yorkshire Fans (TdY Fans). This section also includes the economic assessment of spectators that did not consider watching the Tour as their main reason for being in Yorkshire. These spectators will be known as Casual Spectators as they became spectators of the Tour de Yorkshire.

It is necessary to further sub-divide the spectators who are resident *elsewhere in the UK or overseas*, see Figure 4.1 for the breakdown. Spectators are sub-divided into:

1. Spectators that are Day Visitors to Yorkshire (DV),
2. Spectators that are visiting Yorkshire, that stayed overnight and paid for accommodation (££)
3. Spectators that are visiting Yorkshire, that stayed overnight with friends and family (FF)

Figure 4.1 Breakdown of spectators who are resident elsewhere in the UK or overseas

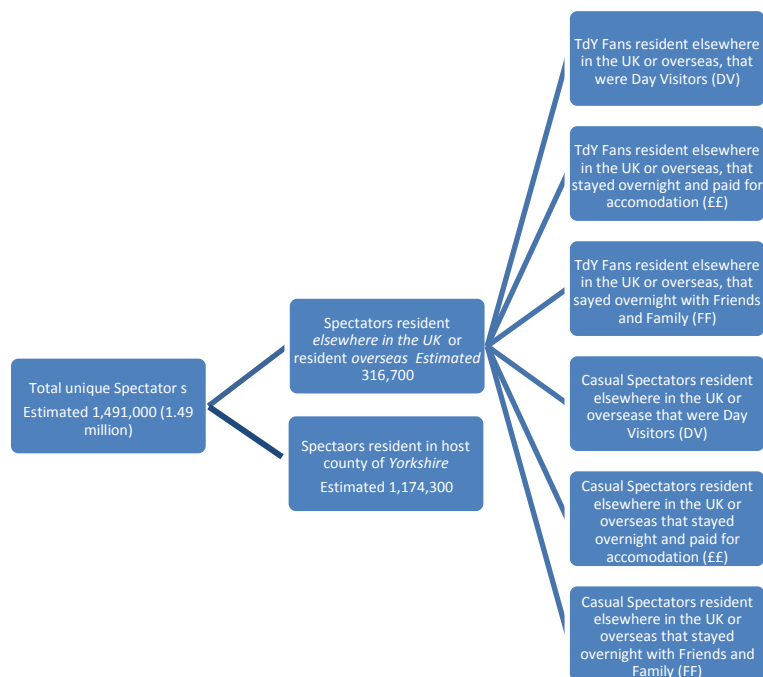


Table 4.1 below provides a more detailed breakdown of the sub-divisions by spectator type.

Table 4.1 Breakdown of spectators who are resident elsewhere in the UK or overseas

	Number of survey participants	%	Estimated number of spectators

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TdY Fans resident elsewhere in the UK or overseas that were Day Visitors (DV)	127	12	183700
TdY Fans resident elsewhere in the UK or overseas that stayed overnight and paid for accommodation (££)	59	6	85300
TdY Fans resident elsewhere in the UK or overseas, that stayed overnight with Friends and Family (FF)	9	1	13000
Casual Spectators resident elsewhere in the UK or overseas that were Day Visitors (DV)	10	1	14500
Casual Spectators resident elsewhere in the UK or overseas that stayed overnight and paid for accommodation (££)	14	1	20200
Casuals Spectators resident elsewhere in the UK or overseas that stayed overnight with Friends and Family (FF)	0	0.00	0
	219	*21%	**305000

*Items rounded

** Total residents elsewhere in the UK or overseas + residents of host county of Yorkshire rounded to 1.5 million spectators.

The economic assessment data presented in the tables below is based on the spending of TdY Fans and Casual Spectators resident elsewhere in the UK or overseas. Table 4.2 below details the estimated Yorkshire accommodation revenue.

The estimated number of bed nights from TdY Fans resident elsewhere in the UK and overseas is **214,163**

Table 4.2 TdY Fans resident elsewhere in the UK and overseas accommodation revenue

Number of nights	Estimated accommodation cost Per Night (per person)	Estimated total revenue to accommodation sector
2.5 nights*	£47.25	£10,112,583

The number of bed nights from TdY Fans resident elsewhere in the UK and overseas is **69,444**.

Table 4.3 Casual spectators resident elsewhere in the UK and overseas accommodation revenue

Number of nights	Estimated Accommodation Cost Per Night (per person)	Estimated Total Revenue to Accommodation Sector
3.4 nights*	73.65	£5,112,722

To summarise Table 4.4 below presents the total accommodation revenue from elsewhere in the UK and overseas spectators based on data From Survey.

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Table 4.4 Total elsewhere in the UK and overseas accommodation revenue

TdY Fans resident elsewhere in the UK and overseas	£10,112,583
Casual Spectators resident elsewhere in the UK and overseas	£5,112,722
Total	£15,225,305

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Table 4.5 below shows the estimated average spend on **non-accommodation** items per person (e.g. food/drink, merchandise, public transport/taxis, fuel, parking/car hire and “other”). As expected, spectators who were staying overnight with friends and family spend less on non-accommodation items than Day Visitors and spectators that stay over and pay for accommodation.

Table 4.5 Estimated non-accommodation revenue by spectator type that reside elsewhere in the UK or overseas

	Estimated spend per person	Estimated total spend
Elsewhere in the UK and overseas TdY Fans DV		
	34.52	£6,340,047
Elsewhere in the UK and overseas Tdy Fans ££		
	84.64	£7,222,199
Elsewhere in the UK and overseas TdY Fans FF		
	39.30	£511,529
Elsewhere in the UK and overseas Casuals DV		
	18.41	£266,245
Elsewhere in the UK and overseas Casuals ££		
	56.12	£1,136,206
Elsewhere in the UK and overseas Casuals FF		
	The survey revealed no spectators of this type attended the 2016 Tour de Yorkshire	

Notes:

Survey Question “Please estimate for us roughly (to the nearest pound) how much you & your party spent on an average day whilst attending the Tour de Yorkshire.”

To summarise Table 4.6 presents the total non-accommodation revenue from elsewhere in the UK and overseas spectators based on data From Survey.

Table 4.6 Total elsewhere in the UK and overseas non-accommodation revenue

Elsewhere in the UK and overseas TdY Fans DV	£6,340,047
Elsewhere in the UK and overseas Tdy Fans ££	£7,222,199
Elsewhere in the UK and overseas TdY Fans FF	£511,529
Elsewhere in the UK and overseas Casuals DV	£266,245

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Elsewhere in the UK and overseas Casuals ££	£1,136,206
Total	£15,476,226

To summarise the total accommodation revenue from TdY Fans and Casual Spectators that reside elsewhere in the UK and overseas is **£15,225,305**; non-accommodation revenue is **£15,476,226**.

5. Economic Assessment – Spectators resident in the host county of Yorkshire

The economic assessment outlined in this section of the report is based on spectators that completed the Route Spectator Survey or the Online Spectator Survey that are residents of the host county of Yorkshire. The economic assessment includes spectators that specifically came to watch the Tour de Yorkshire; these spectators will be known as Tour de Yorkshire Fans (TdY Fans). This section will also include the economic assessment of spectators that did not consider watching the Tour. However, these spectators will be known as Casual Spectators as they had a casual interest in the Tour however, they became spectators of the Tour.

As with resident *elsewhere in the UK or overseas spectators*, the spectators that are residents of the host county of Yorkshire are also sub-divided; see Figure 5.1 for a breakdown. Spectators are further sub-divided into:

1. Spectators resident in the home county of Yorkshire, that are Day Visitors (DV),
2. Spectators resident in the home county of Yorkshire, that stayed overnight and paid for accommodation (££)
3. Spectators resident in the home county of Yorkshire, that stayed overnight with friends and family (FF)

Figure 5.1 Breakdown of spectators who are resident in the home county of Yorkshire

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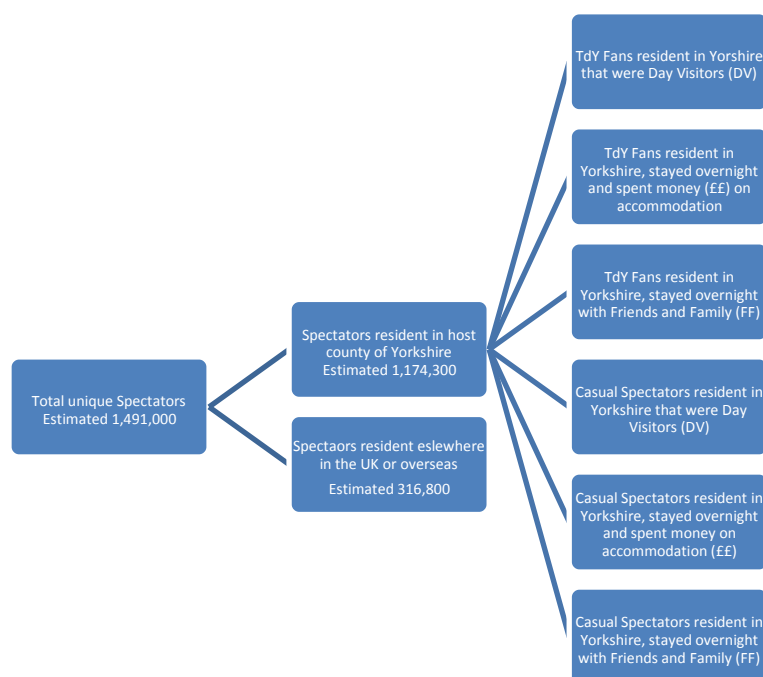


Table 5.1 below provides a more detailed breakdown of the different sub-divisions of spectator types.

Table 5.1 Breakdown of spectators who are resident in the home county of Yorkshire

	Number of survey participants	%	Estimated number of spectators
TdY Fans resident in Yorkshire that were Day Visitors (DV)	629	61	909,600
TdY Fans resident in Yorkshire, stayed overnight and spend money (££) on accommodation	66	6	95,500
TdY Fans resident in Yorkshire, stayed overnight with Friends and Family (FF)	7	1	10,100
Casual Spectators resident in Yorkshire that were Day Visitors (DV)	102	10	147,500
Casual Spectators resident in Yorkshire, stayed overnight and spent money on accommodation (££)	8	1	11,600
Casual Spectators resident in Yorkshire, stayed overnight with Friends and Family (FF)	0	0.00	0
	812	*79%	**1,174,300

*Items rounded

** Total residents elsewhere in the UK or overseas + residents of host county of Yorkshire rounded to 1.5 million spectators.

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The economic assessment data presented in the tables below is based on the revenue from TdY Fans and Casual Spectators that are resident in the home county of Yorkshire. Table 5.2 below details the estimated amount they spent on accommodation in Yorkshire.

The estimated number of bed nights from TdY Fans resident in the host county of Yorkshire is 209,938

Table 5.2 TdY Fans resident in the host county of Yorkshire: Accommodation Revenue

Number of nights	Estimated accommodation cost Per Night (per person)	Estimated total revenue to accommodation sector
2.2 nights	43.86	£9,198,227

The estimated number of bed nights from Casual Spectators resident in the home county of Yorkshire is 34,707.

Table 5.3 Casual Spectators resident in the host county of Yorkshire: Accommodation Revenue

Number of nights	Estimated accommodation cost Per Night (per person)	Estimated total revenue to accommodation sector
3 nights	£44.03	£1,528,265

To summarise Table 5.4 below presents the total accommodation revenue from host county of Yorkshire spectators based on data From Survey.

Table 5.4 Total host county of Yorkshire accommodation revenue

TdY Fans resident elsewhere in the UK and overseas	£9,198,227
Casual Spectators resident elsewhere in the UK and overseas	£1,528,265
Total	£10,726,492

Table 5.4 below shows the estimated average spend on **non-accommodation** items per person (e.g. food/drink, merchandise, public transport/taxis, fuel, parking/car hire and “other”).

As expected, spectators who stayed overnight with friends and family spend less on nonaccommodation items than Day Visitors and spectators that stay over and pay for accommodation. Additionally, Spectators resident in the host county of Yorkshire generally spend less per person than Spectators resident elsewhere in the UK and overseas. One of the reasons for this is due to the fact that participants residing in Yorkshire are asked not only to share details of how much they spend whilst watching the Tour de Yorkshire but also to share details of how much they would have spent on a normal day (i.e. not at the Tour de Yorkshire event). The normal day spend (assuming all money spent is spent in Yorkshire) is deducted from the total amount spent at the Tour de Yorkshire.

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Table 5.5 Estimated non-accommodation revenue by spectator type that reside in the host county of Yorkshire

	Estimated spend per person	Estimated total revenue
Yorkshire TdY Fans DV		
	12.48	£11,352,307
Yorkshire TdY Fans ££		
	48.80	£4,657,947
Yorkshire TdY Fans FF		
	14.57	£147,492
Yorkshire Casuals DV		
	6.23	£919,426
Yorkshire Casuals ££		
	43.19	£499,636

To summarise Table 4.6 presents the total non-accommodation revenue from elsewhere in the UK and overseas spectators based on data From Survey.

Table 4.6 Total host county of Yorkshire non-accommodation revenue

Yorkshire TdY Fans DV	£11,352,307
Yorkshire TdY Fans ££	£4,657,947
Yorkshire TdY Fans FF	£147,492
Yorkshire Casuals DV	£919,426
Yorkshire Casuals ££	£499,636
Total	£17,576,808

6 General feedback from all spectators

Survey participants were also asked a series of questions aside to establish behaviour and their thoughts and feeling so the Tour de Yorkshire. The following information provides details of their behaviour and experience of the Tour.

Question: Did you attend any of the Tour de Yorkshire stages last year?

Table 6.1 Attendance at the 2015 Tour de Yorkshire

Yes =	653	Yes =	63
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No =	373	No =	36
No Response	5	No Response	1
	1031		100

The data suggests that many spectators have returned to the race with 63% stating they had attended the 2015 Tour de Yorkshire. Indeed Table 6.2 shows that some spectators are truly dedicated to the race with 61% stating they also attended the Grand de Parte

Question: Did you attend any of the Tour de France stages in Yorkshire or Cambridge to London as part of the Grand Depart in 2014?

Table 6.2 Attendance at the Grand Depart 2014

Yes =	633	Yes =	61
No =	216	No =	21
No Response	182	No Response	18
	1031		100

It is also very interesting to see that many spectators also like to watch further coverage of the Tour de Yorkshire on TV

Question: Did you watch any of the live Tour de Yorkshire coverage on TV last year? Table 6.3 Watching the Tour de Yorkshire 2015

Yes =	633	Yes =	61
No =	216	No =	21
No Response	182	No Response	18
	1031		100

Spectators were also asked to describe their experience of the Tour de Yorkshire. The analysis shows that spectators had a range of positive experiences which have been themed into six types. Table 6.4 provides quotes from the spectator surveys together with details of their gender, where the spectator resides and their age.

Question: Please describe your Tour de Yorkshire experience?

Table 6.4 Themed analysis of spectator quotes of their TdY experience

Lead Theme	Similarities	Quotes
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<p>Fantastic</p>	<p>Excellent, brilliant, extraordinary, incredible, terrific</p>	<p>Fantastic - I watched two stages and participated in the sportive (Male, Dundee Wharf, London aged 45-54)</p> <p>Fantastic event, wish I could be a spectator at more than one place. Villages of Scholes, Barwick & East Rigton really did the event proud (Male, Oldham, aged 45-54)</p> <p>Absolutely worth every minute stood in the rain on Sutton Bank. Being at the finish at Scarborough was also fantastic (Female York aged 45-54)</p> <p>Absolutely fantastic, thrilled to bits. (Female Hartlepool aged 65+)</p>
<p>Atmosphere</p>	<p>Ambiance, feeling, environment, surroundings, mood</p>	<p>Brilliant atmosphere - felt part of something special (Female aged 55-64 Hambleton Council)</p> <p>I took my 12 year old son to the finish line in Doncaster for the end of stage 2 - it was a great atmosphere. (Male, Doncaster, aged 45-54)</p> <p>Love the buzz that the crowd has when the peloton is getting close (Male, Sheffield, aged 45-54)</p> <p>Great as always. Fantastic atmosphere, well organised, good facilities, even the weather was kind! (Female, Glasgow, aged 35-44)</p>
<p>Enjoy, fun</p>	<p>Pleasure, benefit, enjoyable, amusing, entertainment, exciting</p>	<p>Excellent day with family, lots of activities to keep the kids entertained. (Male, Newcastle, aged 35-44)</p> <p>Memorable, fun community spirit (Female, Worksop, aged 35-44)</p> <p>We have spectated at major events all over Europe but Sutton Bank was the best spectating experience we have enjoyed. (Male, Bradford Council, aged 55-64)</p> <p>Entertaining, good friendly community atmosphere. the singing was excellent and also the entertainment on stilts was good - Donco (big monster) (Female, Haworth, aged 65+)</p>
<p>Cycling race/sport</p>		<p>Loved seeing the cyclist pass and the whole experience of watching a pro-cycle race first hand (Male, Leeds, aged 35-44)</p> <p>A challenging cycle ride on my own planned route to see the race at the top of Blakey Ridge and then on the big screen at Danby North Yorkshire Moors Centre. Enjoyed the atmosphere and being able to ride part of the route. (Female Scottish, Borders, aged 45-54)</p>

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		<p>Exciting chance to talk to the riders and Christian Prudhomme ace. (Male, Harrogate Borough Council, aged 55-64)</p> <p>Great atmosphere- v pleased support the Womens' race (Female, Twickenham, aged 25-34)</p>
Yorkshire		<p>Yet again, my favourite day out in the year. Just a fantastic spectacle embracing our great county (Male, Harrogate, aged 45-54)</p> <p>Amazing, to see Thomas Voeckler winning in Scarborough was just fantastic. There's real sense of pride and excitement in seeing these top cyclists in my home county. The Grand Départ of the Tour de France was once in a lifetime, emotional, spectacular and have created this legacy from that is a wonderful achievement. I love the whole thing (Female, Sheffield, aged 45-54)</p> <p>To see a different part of Yorkshire + go somewhere with hills! (Male, Peterborough, aged 35-44)</p> <p>Cycling with my small children could have been a skyrideesque experience. Cheering the sportif could have been a race for life type experience, and the children chalking on the road could have been formalised as part of a street party experience. I think the Tour de Yorkshire has the potential to be a mass participation event (like the London Marathon?) as well as a sporting spectacle, a demonstration of community pride, and a great advert for the county. (Male, Bradford, aged 35-44)</p> <p>Churches, cafe and regent hotel were very helpful to the customer, good Yorkshire welcome, and looking forward to next time (Female, Pembrokeshire, aged 65+)</p>
Amazing	Astonishing, wonderful, marvellous, mind-boggling, mind-blowing, buzz	<p>It was an amazing experience, spent time with the family as well. (Female, Leeds, aged 25-35)</p> <p>A1. Superb. Fabulous. Incredible. Gobs macking. (Male, Ulverston Cumbria, aged 65+)</p> <p>Amazing. Bring on 2017! (Female, Bakewell Derbyshire, aged 35-44)</p> <p>Love the buzz that the crowd has when the peloton is getting close (Male, Sheffield, aged 45-54)</p>

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