# NORTHUMBERLAND VISITOR SURVEY 2010



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### 1. INTRODUCTION

In 2005/06 One North East carried out the first region wide visitor survey for One North East England to establish baseline profiles of *tourists* to the region. The survey was repeated in 2008 and again in 2010 to establish any changes in consumer demographics or behaviours. This report gives the results of the 2010 survey and where appropriate demonstrates any marked changes on previous surveys. The survey methodology allows for reporting on a sub regional basis. This report covers the findings for Northumberland.

The key objectives of the survey were to:

- To inform development decisions for the region and individual sub regions
- Understand visitor satisfaction and identify areas for improvement
- Understand people's motivation for visiting
- Gather visitor profiles such as demographics, booking sources, use of the internet etc
- Gather economic expenditure data to feed into economic impact reports

### 2. METHODOLOGY

The survey saw a total of 2609 face to face interviews carried out between May and September across the North East to ensure a representative sample. An even split of interviews was targeted in each sub region with 400 completed interviews the target. The number of completed interviews in Northumberland was 400. However additional surveys were purchased by both Northumberland National Park and the North Pennines AONB bringing the total sample to 602.

Interviews were carried out in:

- Kielder (Leaplish Waterside Park)
- Wooler
- Alnwick Garden
- Woodhorn Museum
- Lindisfarne Castle
- Bamburgh Castle
- The Chantry TIC Morpeth
- Berwick TIC
- Vindolanda
- Seahouses
- Rothbury TIC
- Allen Banks and Staward Gorge
- Blanchland

The core sample is used for questions such as expenditure and satisfaction as well as identifying where visitors stay. The whole sample is used where appropriate to identify visitor profiles etc as this gives a more robust picture.

Some rules in the form of quotas were applied to the interviews which were:

- 50% of respondents to be overnight visitors (achieved 62%)
- Maximum of 25% being shoppers (achieved 1%)
- Minimum of 25% from outside the region (achieved 54%)

Statistically the margin of error for a sample of 602 is +/- 4%.

The information held within this report forms only part of the picture concerning visitors to North East England. Many other important sources of information concerning the performance of tourism can be found at <a href="https://www.tourismnortheast.co.uk">www.tourismnortheast.co.uk</a>

### 3. KEY FINDINGS

### **Visitor Profiles**

- 62% of visitors to North East England are staying overnight.
- 16% of visitors are new visitors while more than 1/3<sup>rd</sup> have been more than 20 times before.
- 46% of visitors are from the North East, 13% from within Northumberland itself. 6% of visitors are from overseas.
- More than 1/5<sup>th</sup> of visitors said their main reason for visit was general sightseeing. Significant growth was seen in people citing eating out, walking and visiting a market town as their main reason for visit.
- Almost 9 out of 10 visitors use their own car to travel to Northumberland
- Previous visits to the region play a significant role in visitors choosing to return. 63% saying this was an influence while more than 1/5th went on the recommendation of friends and relatives.

### Accommodation

- Visitors rely heavily on the non serviced sector in Northumberland with 26% staying in self catering properties and 26% on caravan/campsites.
- Almost 30% of visitors book their accommodation between 1 and 3 months in advance. However growth has been seen in the number of bookings made closer to the time of arrival as visitors wait to see what the weather will be like or wait for discounts from accommodation providers.
- Almost three quarters of visitors book directly with the accommodation provider, 38% choosing to book online.

# **Expenditure**

 The average visitor spent £58.56 per day with the average day visitor spending £30.11 per day and overnight visitor spending £65.80.

# Importance and Satisfaction

- 97% of visitors said their overall visit was good or very good while 98% said they would recommend the area to friends and relatives
- Cleanliness is the most important aspect of the trip for visitors, 53% saying it
  was very important. This was followed by parking facilities, ease of parking
  and accommodation.

- 62% of visitors to Northumberland rated the attraction as very good followed by cleanliness (57%) and accommodation (56%).
- 52% of visitors said the customer service they received from staff at their accommodation was very good. Only 23% of visitors said their service in the retail establishments of Northumberland was very good.

### 4. VISITOR TYPE AND ORIGIN

# 4.1 Visitor Type

Almost 2/3rds of visitors to Northumberland are overnight visitors. This is the highest of all the sub regions and significantly higher than the regional average. In part this can be put down to the fact that Northumberland is a more rural area and visitors feel they need to stay longer to be able to see more of it as it is difficult to fit more than one activity into a day trip due to the distances between key attractions. Also high numbers of visitors to Northumberland stay in non serviced accommodation meaning their average length of stay is longer.

Which of the below best describes what you are doing here today?			
On a day trip from home (from within the North East)	33		
Away from home on a holiday in the North East	57		
Away from home visiting friends and relatives on holiday in North East	4		
On a day trip to visit friends and relatives	2		
VFR other reason	1		
On a day trip to the area on holiday from outside the North East	2		

### **4.2 Group Composition**

72% of visitors travel to Northumberland with their partner/spouse while less than 1/5<sup>th</sup> of parties include children under 16. The number of visitors indicating they are travelling with friends has grown since 2008. On average there were 3 people in each party visiting Northumberland.

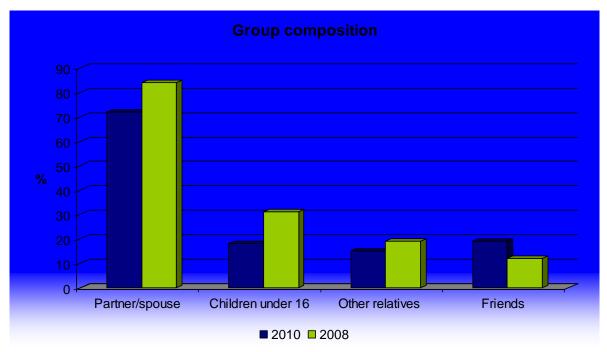


Chart 1: Group Composition

### 4.3 Visit Frequency

16% of visitors to Northumberland in 2010 were visiting for the first time brought possibly as a result of new events such as Extraordinary Measures at Belsay Hall as well as increased online marketing and PR campaigns by Visit Northumberland.

At the opposite end of the spectrum 36% of visitors have been more than 20 times before, this is line with evidence previously seen whereby many visitors to Northumberland return year after year staying in the same accommodation.

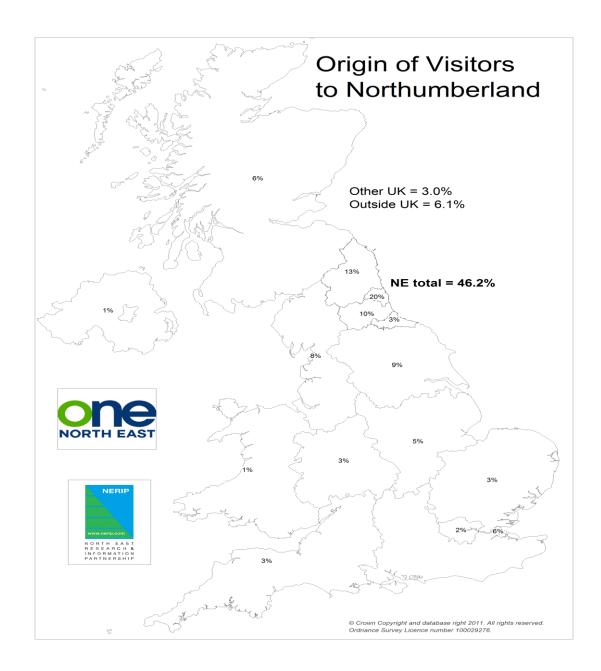
	UK	OVERSEAS	DAY	OVERNIGHT
First visit in five years	9	23	4	13
2 - 3 times	24	23	15	30
4 - 6 times	12	4	8	14
7 - 8 times	3	4	2	3
9 - 10 times	4	4	3	4
11 - 20 times	4	12	5	4
More than 20 times	36	27	50	25
Don't know / can't remember	10	4	14	7

# 4.4 Origin

46% of visitors to Northumberland were from within the North East, 13% of these actually living in Northumberland itself. While the number of visitors from within Northumberland itself has remained constant, visitor numbers from the rest of the region have grown from 25% in 2008 to 33% in 2010 possibly linked to the availability of outdoor activities in the county as well as events such as Extraordinary measures held at Belsay Hall.

Outside of the North East, Northumberland welcomed higher levels of visitors from Yorkshire, the North West, South East and Scotland. International visitors made up 6% of all visitors to Northumberland. Please see the map overleaf.

Australia, Canada and the USA provide the highest levels of internationals with the full list available in appendix A.



# 4.4 Segmentation

Segmentation is important as it allows us to gain greater insight into the habits of our visitors, the newspapers they read, the TV they watch and the things they like to do. This allows us and businesses to use any money we spend on marketing more effectively knowing we are using channels our target audience respond to and send them messages which are more likely to motivate them to take a break in. The segments most represented in Northumberland were High Street and Cosmopolitan. Please see chart 2 overleaf for more details.

# Segmentation

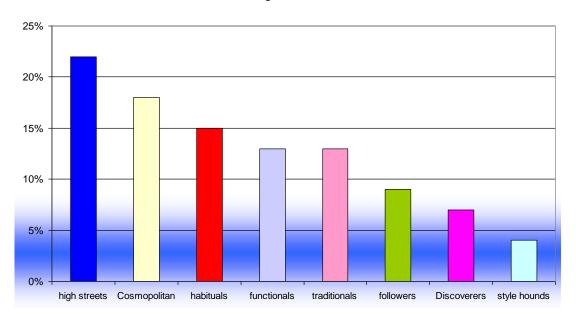


Chart 2: Segmentation

# 5. VISITOR PURPOSE AND CHARACTERISTICS

# 5.1 Main reason for visit

More than 1/5<sup>th</sup> of visitors to Northumberland indicated that their MAIN reason for visiting was to undertake general sightseeing. Interestingly however this has fallen on the levels of 2008 while a number of other areas of motivation had grown including:

- Walks of longer than 2 miles
- Visiting a market town
- Visiting heritage sites
- Eating out

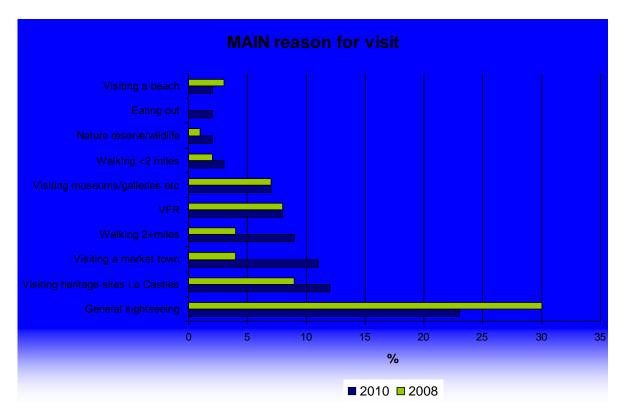


Chart 3: Main reason for visit

Looking at this growth we can make assumptions that work undertaken by organisations such as Northumberland Tourism have helped to develop sectors such as food and drink while it also appears visitors are now more aware of where they are within Northumberland, able to name a market town rather than just saying general sightseeing.

# 5.2 Transport used

87% of visitors travelled to Northumberland in their own car in 2010 with public coach (4%) and aeroplane (7%) being the next highest.

# **Transport comparisons**

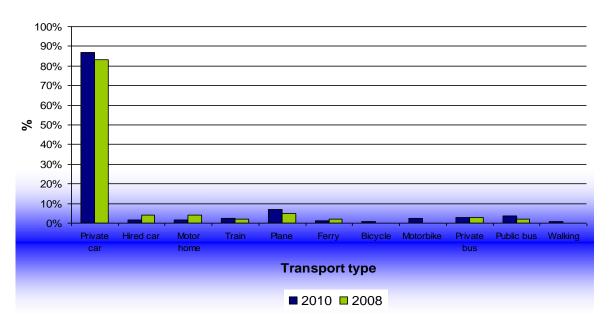


Chart 4: Comparison of transport types

If we compare this against 2008 we are able to see a growth in the number of people using their own car. This has a significant bearing on the importance placed by visitors on areas such as signage, car parking facilities and the ease of parking. More can be seen on this in section 9. Local authorities and destination developers need to pay particular attention to aspects such as these as this has a significant impact on the overall visitor experience and likelihood of people making repeat visits.

Also compared to 2008 the levels of people using both the train and plane to get to Northumberland have fallen.

Once people are in Northumberland, 81% still use their own car to get around mainly due to the distance between attractions and amenities, however there is a significant growth in walking with 15% saying they get around by walking once in the region.

# 6. VISITOR INFORMATION

# 6.1 Influence

63% of visitors to Northumberland said a previous visit played a part in their decision to make this trip while more than a fifth were influenced by the advice of friends and relatives. Both of these areas had seen growth on the levels of 2008.

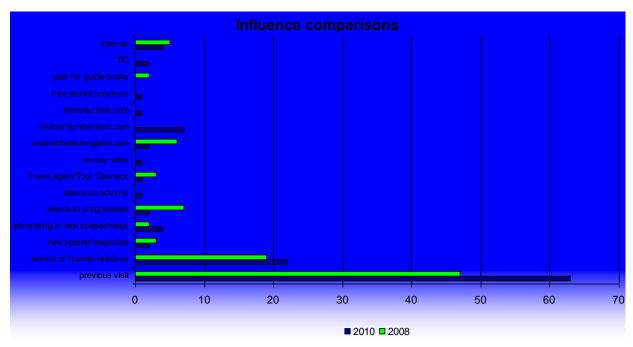


Chart 5: Influences on visit

Promotional activity linked to Northumberland has also played its part in attracting visitors with more than 1 in 10 visitors being influenced by activity such as:

- www.visitnorthumberland.com
- Advertising in newspapers/magazines
- Free tourist brochures
- Tourist Information Centres

18% of visitors came to Northumberland as a result of destination marketing, indeed visitnorthumberland.com influenced 7% of visitors.

# 6.2 Information during the visit

Almost half (43%) of the visitors to Northumberland said that they used information while in the area. This was significantly higher than the regional average of just 28%. If we look at chart 5 below we can see that first time visitors as well as those travelling from overseas have a significantly higher propensity to pick up information.

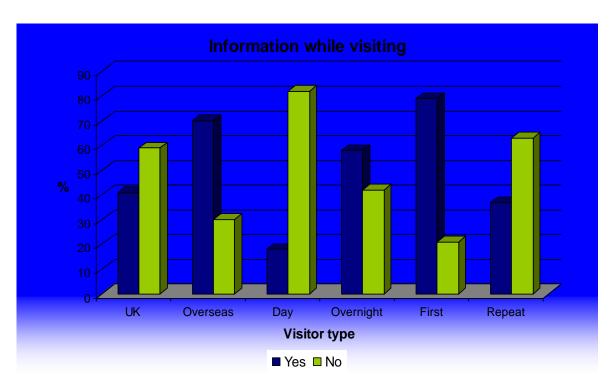
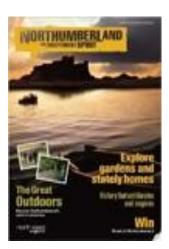


Chart 6: Information during visit

Of those that said they had picked up information almost half got their information from Tourist Information Centres while 38% found it in their accommodation. Interestingly 1/5<sup>th</sup> use their own computer to access information while on holiday in Northumberland.

### 6.3 Guide Use

Respondents to the survey were shown a flash card containing all of the guides produced for the North East region and asked if they had used any prior to the visit and also while on their visit. In Northumberland 89% said they did not use any before while 82% did not use them whilst on their trip.



Of those that did use guides 7% used the Northumberland holiday guide (seen on the left) prior to visit and 11% took information from it while in the region. The other guide used by visitors to Northumberland was the Hadrian's Wall Holiday and Short Breaks Guide used by 3% prior to visit and 6% while in the region.

### 7. ACCOMMODATION

# 7.1 Type of accommodation

Visitors to Northumberland rely heavily on the non serviced sector in both self catering establishments (26%) and caravan/camping facilities (26%). This is in line with the size of these sectors within Northumberland.

Interestingly however, 2010 saw a decline in the number of visitors using caravan and camping facilities and a growth in the serviced sector with both Hotels and Guesthouse/B&B's seeing a growth. There has been a trend in the North East and indeed at a national level in 2010 for people taking shorter breaks opting for 2/3 nights stays rather than 7 or 14 night holidays as a result of the economic climate and indifferent weather in the UK. Also a number of people had taken their main holiday in the UK as a result of the staycation trend and had perhaps moved slightly away from this in 2010. The rise in those staying in hotel accommodation may also be linked to visitors staying in Newcastle and travelling to Northumberland for the day.

# **Accommodation comparisons**

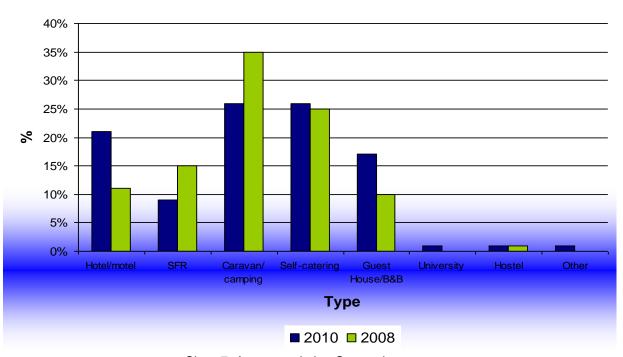


Chart 7: Accommodation Comparisons

Interestingly overseas visitors were most likely to be staying with friends and relatives or camping. Expenditure on accommodation is captured within section 8.

### 7.2 Lead Times

As we can see from chart 7 below almost 30% of visitors booked their trip between 1 and 3 months in advance. Almost half (46%) of overseas visitors book between 1 and 3 months ahead of their trip. Consideration should also be given to the fact there is a significant difference between booking 4 and 12 weeks in advance all of which are captured within this grouping. It is also interesting to note that more than 1/5<sup>th</sup> of visitors book their accommodation less than 2 weeks before arrival.

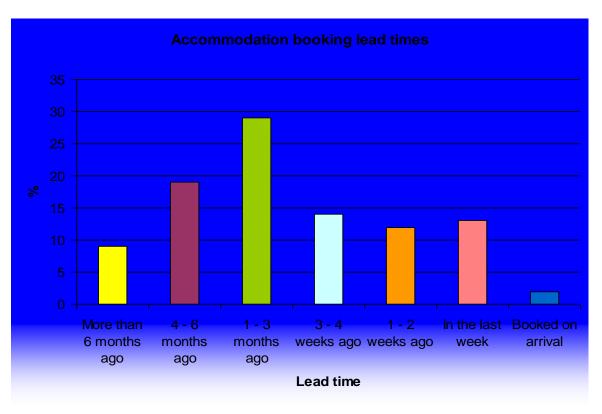
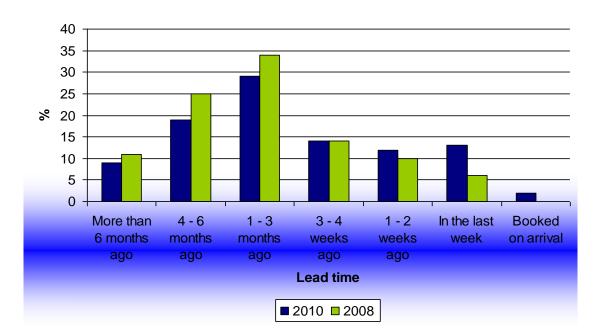


Chart 8: Lead times

If we look at chart 8 we can see that the number of people booking less than a week before their trip has doubled. This falls in line with patterns seen in other research and also nationally whereby consumers are waiting until later to book their trip so they are more confident of the weather for their trip as well as looking to take

### Accommodation booking lead times



advantage of late deals. This will be in line with the growth in B&B/Guesthouse bookings as those staying in self catering properties still tend to book further in advance.

# 7.3 Booking Method

Almost three quarters of visitors to Northumberland booked their accommodation directly with the provider, 38% of these booking online.

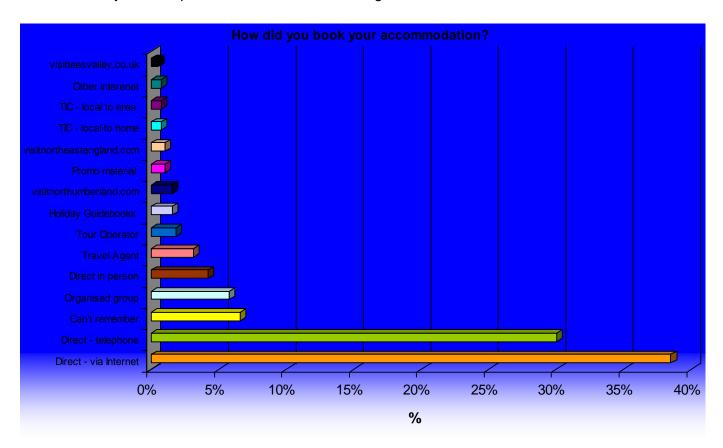


Chart 10: Booking method

# 7.4 Average Length of stay

Northumberland, as with the rest of the North East, has seen a fall in the number of nights visitors are spending, falling from an average of 6 nights in 2008 to an average of just slightly more than 4 in 2010. Self catering guests and overseas visitors have the longest average length of stay.

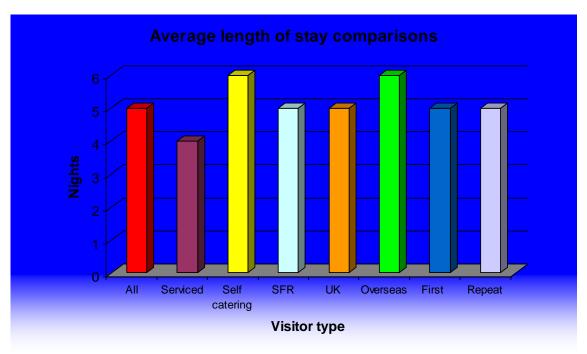


Chart 11: Average length of stay

If we refer back to the type of accommodation people are using on page 13 we see a fall in those camping and also those staying with friends and relatives. This combined with a growth in visitors staying in serviced accommodation gives us a one of the reasons why average length of stay has fallen. This has been supported by a national trend which has seen people moving to shorter breaks due to the economic climate.

### 8. EXPENDITURE

Average expenditure per person per day in Northumberland was £58.56 which is a significant growth on the levels of 2008. Despite a fall in spend on accommodation, spend in all other categories has grown between 2008 and 2010. Expenditure on food and drink and transport saw the highest levels of growth. This growth in food and drink expenditure may be linked to the growth in people citing this as their main reason for visit and therefore being more willing to spend more.

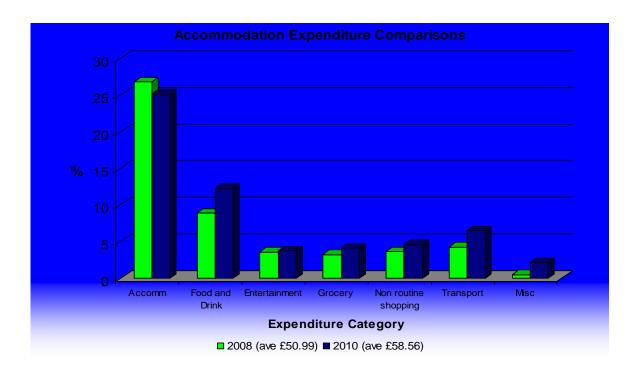


Chart 12: Expenditure comparisons

Looking at different visitor types we can see that day visitors have an average spend of £30.11 while overnight visitors spend £65.80. When looking at overnight visitors, those staying in serviced accommodation spend £77.93 per person per day while those in self catering spend £56.79 per person per day.

### 9. IMPORTANCE AND SATISFACTION

To inform product development and identify areas of improvement for Northumberland it is essential that we ascertain the levels of importance visitors place on aspects of their trip as well as identifying levels of satisfaction with these areas. In order to gain an in depth understanding visitors were not only asked about how satisfied they were but also their reaction to a series of perception statements.

### 9.1 Satisfaction with overall visit

97% of visitors rated their overall visit to Northumberland as good or very good however a note of caution should be given as the number of people saying their trip was very good has dropped from 71% in 2008 to 56% in 2010.

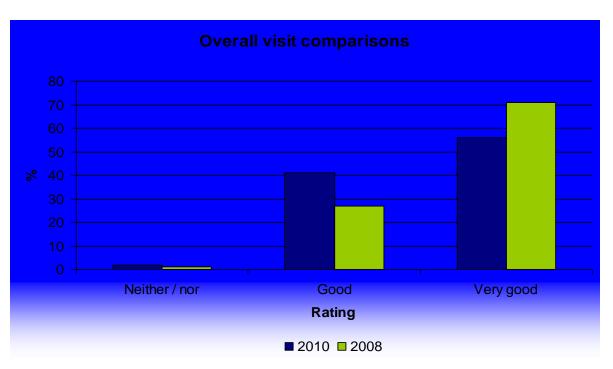


Chart 13: Overall visitor satisfaction

# 9.2 Importance

Visitors place significant importance on traditional holiday facilities such as accommodation and attractions. The fact so many visitors travel to Northumberland by car also sees high levels of importance placed on areas such as the ease of parking and car parking facilities. However the most important aspect of the trip for visitors is the cleanliness of the area with more than half saying it was very important.

	Very Unimportant	Unimportant	Neither	Important	Very important
Attractions	2	4	8	44	42
Retail	13	19	26	31	11
Information	4	7	15	48	27
Accommodation	15	3	4	36	42
Eating					
establishments	2	4	7	53	34
Ease of Parking	2	2	4	50	42
Transport	12	7	21	36	25
Signage	2	4	11	49	35
Nightlife	45	10	26	14	5
Car Parking	3	3	6	46	43
Cleanliness	0	1	1	45	53

### 9.3 Satisfaction

In terms of how visitors rated the various aspects of their trip if we look at the table below we can see that more than half rated their accommodation as very good as well as transport in the region and also cleanliness. A distinction has been drawn between those who said they rated it as very good as opposed to just good. In an increasingly competitive world as well as ones where opinions are shared globally through websites such as TripAdvisor it is vital that we strive for excellence and have more visitors willing to say very good as they are more likely to tell friends and relatives about an excellent trip than one that was just ok.

	Very poor	Poor	Neither	Good	Very Good
Attractions	0	1	2	35	62
Retail	0	2	16	59	23
Information	0	1	3	47	49
Accommodation	1	1	4	39	56
Eating					
establishments	0	0	5	56	38
Ease of Parking	1	2	4	50	44
Transport	0	1	4	45	50
Signage	0	1	4	60	35
Nightlife	3	1	11	59	26
Car Parking	0	2	3	53	42
Cleanliness	0	1	2	41	57

# 9.4 Importance v Satisfaction comparisons

To give an understanding of how the visitor experience matches up against expectations the chart below compares the number of visitors saying the element was very important compared to those who said their experience was very good. With the exception of car parking and signage we can see in Northumberland satisfaction is higher than expectation across all categories particularly in attractions, retail and nightlife.

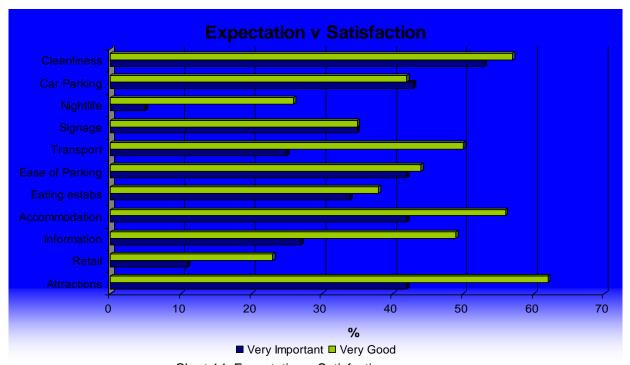


Chart 14: Expectation v Satisfaction

### 9.5 Customer service

As well as the overall satisfaction with the facilities available in the region, visitors were asked to comment on the customer service they had received. Overall more than 40% of visitors said the customer service they had received was very good however this differed by sector. This was significantly higher than the regional average which stood at 35%.

Accommodation providers received the highest ratings with more than half of visitors saying they had received very good service while only 23% of visitors said the service received in Northumberland's shops was very good.



Chart 15: Customer Service

### 10. VISITOR PERCEPTIONS

To gain a deeper understanding of how visitors viewed North East England a series of statements were asked to gauge perceptions of the region. 9 statements were read to the respondents who were asked to what extent the agreed or disagreed with each statement. 7 of the statements were positive while 2 were negative. The statements were, The North East is:

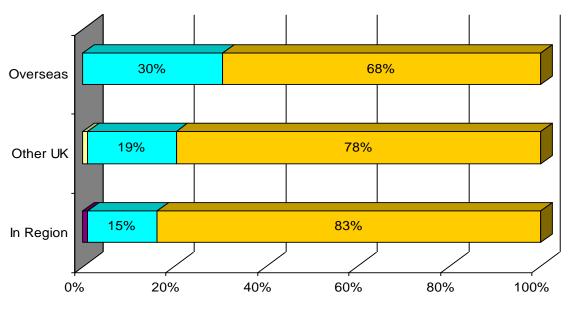
- Friendly and welcoming
- Isolated
- Great place for a holiday
- Great place for short break
- Lacking in culture
- Great place to live
- Region changing for the better
- Place you'll never forget
- · Rich in heritage

Due to the nature of the statements, it was felt the visitors origin would have a bearing on their response so with this in mind we have split responses to the statements by those from within the region, the rest of the UK and Overseas visitors.

It is also worth noting that the question asked about perceptions of the North East, however it can be assumed that the area that they were interviewed in will have a significant bearing on their answers so we can read that the opinions below reflect on Northumberland.

# 10.1 Friendly and welcoming

83% of people from within the region strongly agree that the region is friendly and welcoming. Interestingly, although levels of agreement are high in the other two groups is high, levels of those who strongly agree does fall, 15 percentage points lower for those from overseas than those from within the region.



■ Tend to Disagree □ Neither nor □ Tend to Agree □ Strongly agree

Chart 16: Friendly and welcoming comparisons

### 10.2 Isolated

This question was originally posed to visitors as a negative statement as previous research has shown visitors to feel the North East is difficult to access. The reaction to the statement by visitors to Northumberland is interesting in that as expected more than  $1/3^{rd}$  of all of the groups strongly disagree with the statement. However 1 in 10 visitors from within the region and almost 1 in 10 of the other groups strongly agree that the region is isolated. Although this can be conceived as a negative response in actual fact this feeling of isolation is actually the driver for their trip as they want to get away from it all, enjoy the countryside and go for walks.

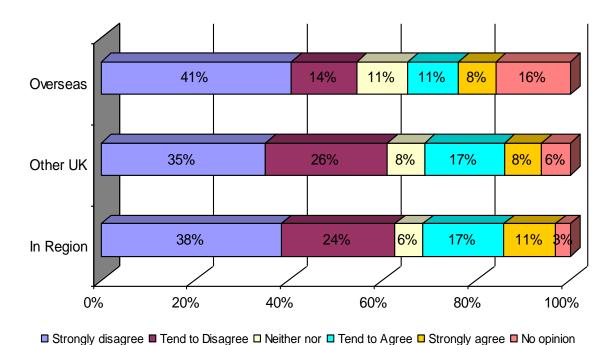
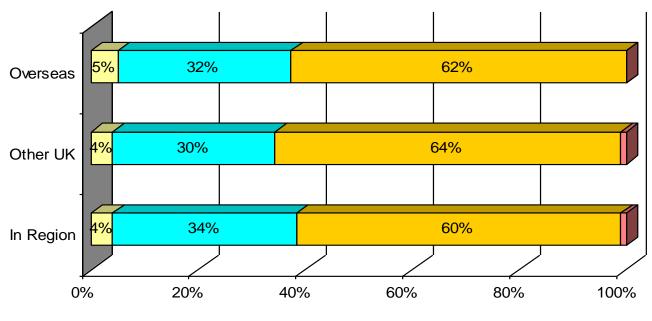


Chart 17: Isolated comparisons

### 10.3 Great place for a holiday

64% of UK visitors from outside of the North East strongly agree that the North East is a great place for a holiday. Interestingly 60% of those from within the region also strongly agree, significantly higher than the average for the region which is 49%. This shows that Northumberland is seen as more of a holiday destination than the other sub regions by those who live in the North East.



□ Neither nor □ Tend to Agree □ Strongly agree □ No opinion

Chart 18: Holiday comparisons

# 10.4 Great place for a short break

9 out of 10 visitors across all types believe that Northumberland is a great place to take a short break with 2/3rds strongly agreeing with the statement.

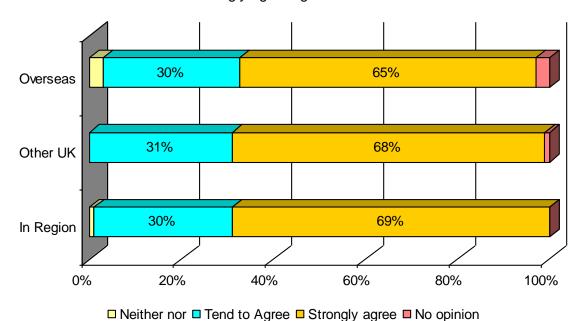
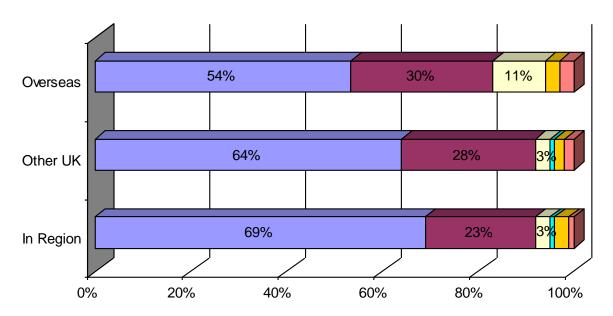


Chart 19: Short break comparisons

### 10.5 Lacking in culture

More than half of all visitors strongly disagree that the region is lacking in culture with 8 out of 10 disagreeing overall. More than 1 in 10 overseas visitors did not commit to an answer, perhaps feeling they had not seen enough to form an opinion.



■ Strongly disagree ■ Tend to Disagree ■ Neither nor ■ Tend to Agree ■ Strongly agree ■ No opinion Chart 20: Culture comparisons

# 10.6 Great place to live

6 out of 10 of those from within the region strongly agreed it was a great place to live, double that of overseas visitors. Unsurprisingly overseas visitors and those from other areas of the UK were more likely to have no opinion.

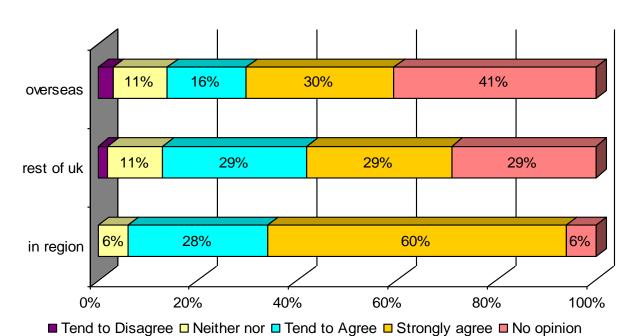
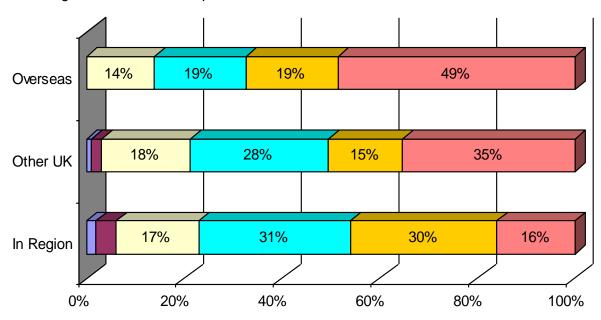


Chart 21: Place to live comparisons

### 10.7 Region changing for the better

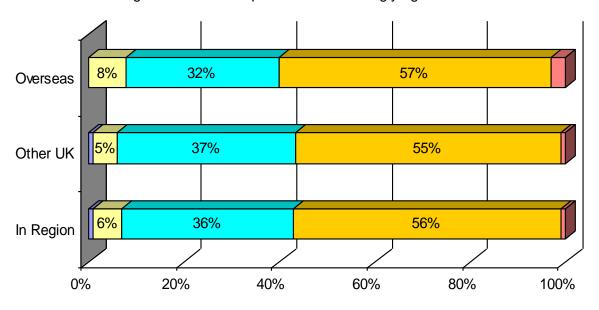
Similar to the previous statement responses to the region being a place changing for the better differed according to the respondents' origin. 30% of those who live in the region strongly agreed it was a place changing for the better while more than half of overseas visitors, perhaps with lower knowledge of the regions past, neither agreed or disagreed, or offered no opinion.



■ Strongly disagree ■ Tend to Disagree □ Neither nor ■ Tend to Agree ■ Strongly agree ■ No opinion Chart 22: Changing for the better comparisons

# 10.8 Place you'll never forget

89% of overseas visitors agree that Northumberland is a place you'll never forget with 92% of both UK and North East residents in agreement. Interestingly, overseas visitors had the highest levels of respondents who strongly agreed.



■ Strongly disagree ■ Neither nor ■ Tend to Agree ■ Strongly agree ■ No opinion Chart 23: Place you'll never forget comparisons

# 10.9 Rich in heritage

The strength of the region's heritage offer is very evident looking at the chart below with 9 out of 10 visitors agreeing that the region is rich in heritage.

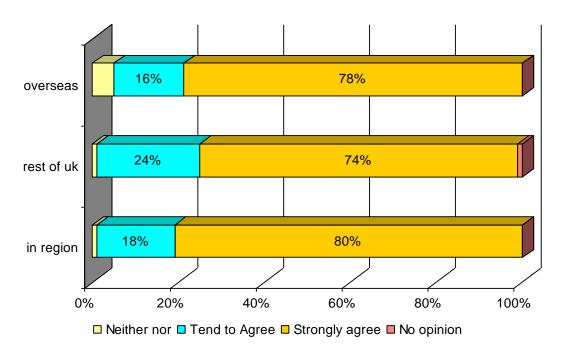


Chart 24: Rich in heritage comparisons

### 11. RESPONDENT PROFILES

# 11.1 Gender and age

Respondents were fairly evenly split with 56% being female and 44% male. As we can see from chart 24 below more than 60% of respondents were over the age of 45 with a quarter between the ages of 55 and 64.

Age of respondents

# 17% 65+ 55-64 25% 45-54 18% 35-44 17% 13% 25-34 16-24 0% 5% 10% 15% 20% 25% 30% %

Chart 25: Age profiles

# 11.2 Marital and employment status

The majority of respondents (81%) were either married or cohabiting, with 11% classing themselves as single. More than half of respondents (55%) were in full time employment with 12% working part time and 26% retired.

Marital Status	
Married/cohabiting	81
Single	11
Widowed	4
Divorced	3
Separated	1
Refused	0

Employment status		
Working full time	55	
Working part time	12	
Retired	26	
In full time education	1	
Unemployed	1	
Other	5	

# APPENDIX A: ORIGIN OF VISITORS

UK	%
Tyne & Wear	20%
Northumberland	13%
Durham	10%
Yorkshire	9%
North West	8%
Scotland	6%
South East	6%
Outside UK	6%
East Midlands	4%
West Midlands	3%
Tees Valley	3%
South West	3%
Other UK	3%
East	2%
London	2%
Northern Ireland	1%
Wales	0%

<b>OUTSIDE OF UK</b>	COUNT
Australia	4
Canada	4
USA	4
Thailand	3
Germany	2
Holland	2
Irish	2
New Zealand	2
Spain	2
Sweden	2
China	1
Finland	1
France	1
Hungary	1
India	1
Isle of Man	1
Netherlands	1
Romanian	1
South Africa	1
Venezuela	1

# APPENDIX B: QUESTIONNAIRE