

NORTHUMBERLAND VISITOR SURVEY 2013

1. INTRODUCTION

In 2005/06 One North East carried out the first region wide visitor survey for 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. Following the abolition of the RDA's the Northern Tourism Alliance recognised the importance of ensuring we have the most up to date information possible on our visitors and chose to come together to fund visitor survey interviews in 2013. This report summarises the findings for the interviews undertaken in Northumberland.

The key objectives of the survey were to:

- To inform development decisions for Durham and the North East
- 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

We received a total return of 334 completed surveys which were a mixture of online responses and surveys completed at attractions such as Woodhorn and Bamburgh Castle.

2. KEY FINDINGS

Visitor Profiles

- 59% of visitors to Northumberland are staying overnight.
- 16% of visitors are new visitors while more than 1/3rd have been more than 20 times before.
- 41% of visitors said their main reason for visit was to visit heritage sites. General sightseeing and visiting artistic or heritage exhibits also came out highly.
- 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. 50% saying this was an influence while almost a 1/3rd went on the recommendation of friends and relatives.

Accommodation

- Visitors rely heavily on the non serviced sector in Northumberland with 29% staying in self catering properties and 14% on caravan/campsites.
- Almost 30% of visitors book their accommodation between 1 and 3 months in advance. Interestingly the spread of bookings sees 14% of visitors booking within 7 days of travel while 17% book more than 6 months in advance.
- Almost three quarters of visitors book directly with the accommodation provider, 35% choosing to book by telephone and a further 335 to book online.

Expenditure

- The average visitor spent £51.32 per day with the average day visitor spending £28.76 per day and overnight visitor spending £59.82.

Importance and Satisfaction

- 99% of visitors said their overall visit was good or very good while 99% said they would recommend the area to friends and relatives
- 41% of visitors to Northumberland rated the quality of visitor attractions as very good followed by variety of things to do (32%) and maintenance of parks (28%).
- 51% of visitors said the customer service they received from staff at their accommodation was very good. Only 27% of visitors said their service in the retail establishments of Northumberland was very good.

3.VISITOR TYPE AND ORIGIN

3.1 Visitor Type

59% of visitors to Northumberland are overnight visitors. 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 Northumberland)	22
Away from home on a holiday in the Northumberland	47
Away from home visiting friends and relatives on holiday in Northumberland	12
VFR other reason	6
On a day trip to the area on holiday from outside the North East	9
Other	5

3.2 Group Composition

43% of visitors travel to Northumberland with their partner/spouse while a further 24% are travelling with other members of their family.

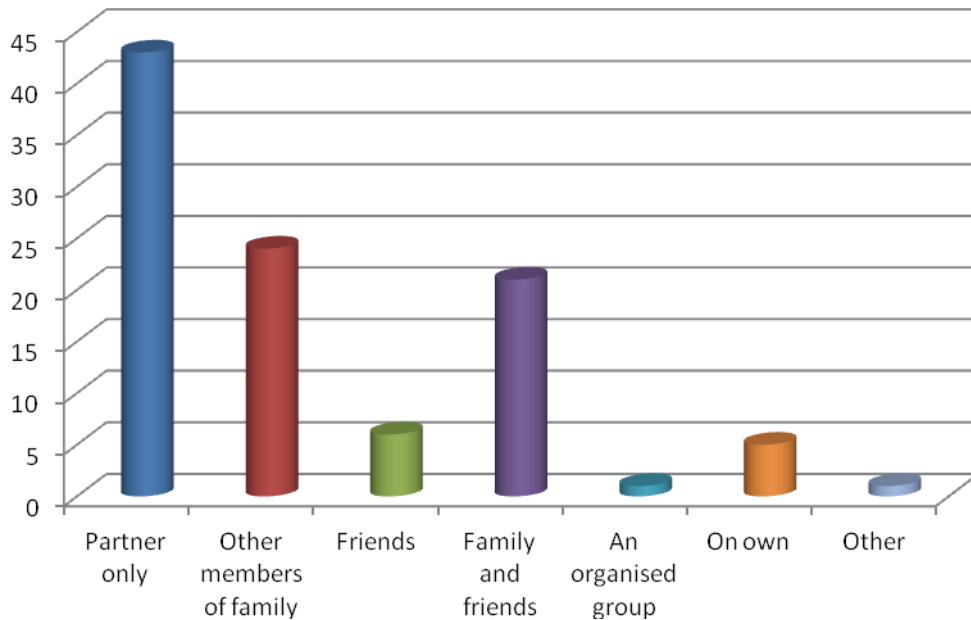


Chart 1: Group Composition

3.3 Visit Frequency

20% of visitors to Northumberland in 2013 were visiting for the first time. At the opposite end of the spectrum 13% of visitors have been more than 20 times in the last 5 years. The mean number of visits is 3.5.

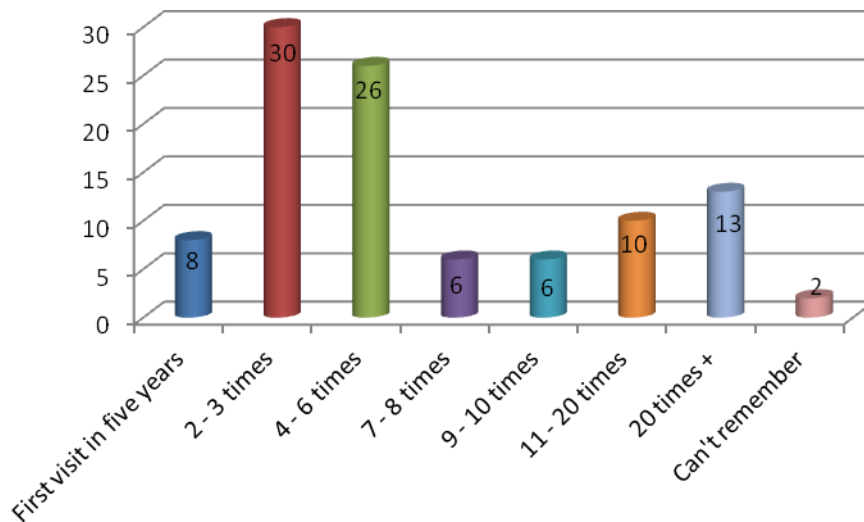


Chart 2: Visit Frequency

Interestingly, visitors were asked which other locations they had considered when deciding on this trip, 12% said Northumberland was their only choice. Smaller numbers made reference to Scotland and the Lake District as alternatives.

4. VISITOR PURPOSE AND CHARACTERISTICS

4.1 Main reason for visit

41% of visitors said that their main reason for visiting Northumberland was to visit heritage sites. This was closely followed by:

- General sightseeing
- Walking
- Visiting artistic or heritage exhibits

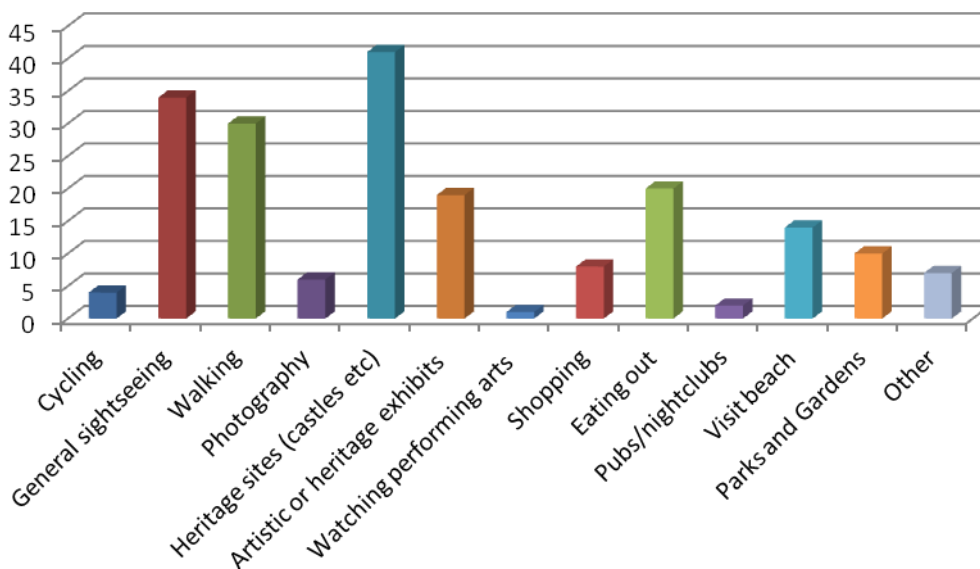


Chart 3: Main reason for visit

When asked which physical attractions they had visited, visitors favoured heritage attractions with Bamburgh Castle (46%), Lindisfarne (35%) and Alnwick Castle (23%) all coming out highly.

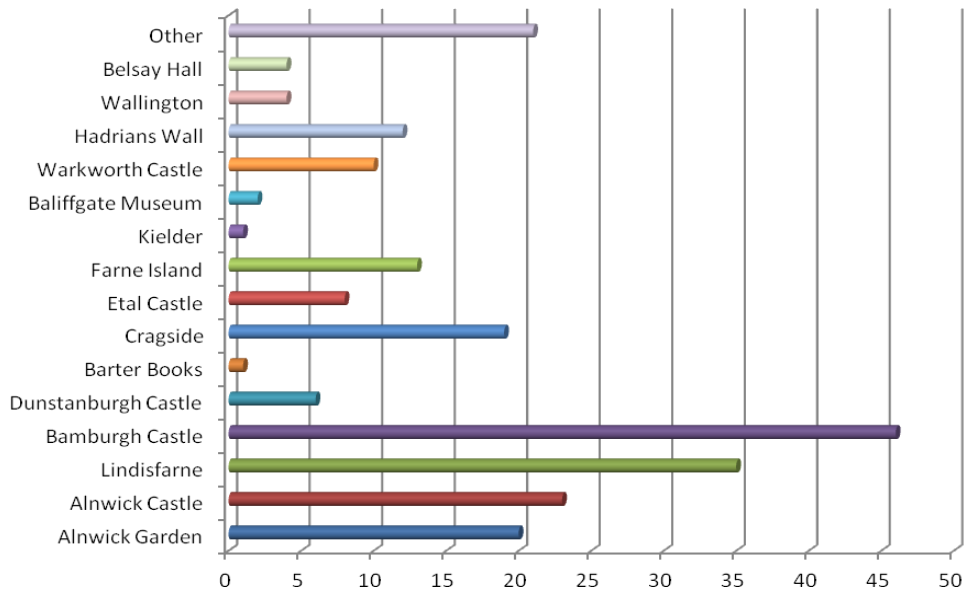


Chart4: Attractions visited

4.2 Transport used

91% of visitors travelled to Northumberland in their own car in 2013 with 7% using the train.

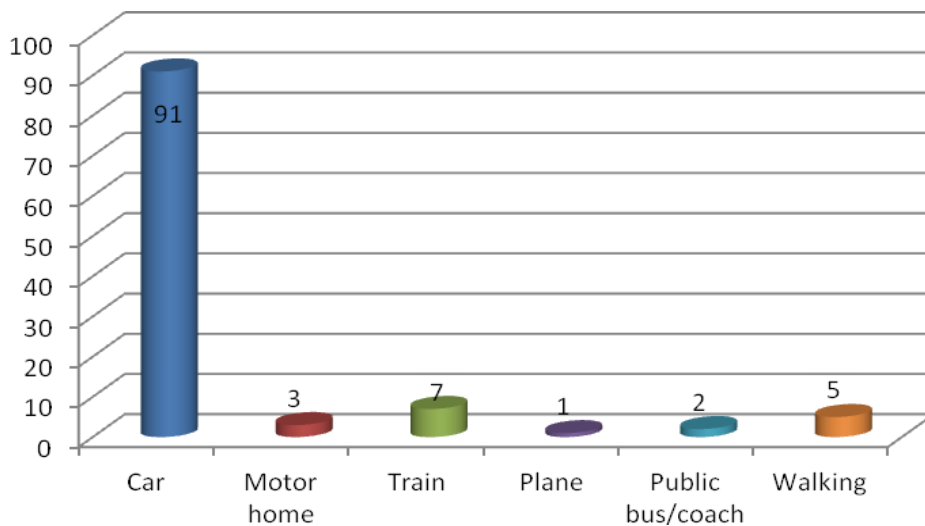


Chart 5: Comparison of transport types

Once people are in Northumberland, 87% 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 29% saying they get around by walking once in the area.

Visitors were allowed multiple responses as they may use different methods on different parts of the trip.

5. VISITOR INFORMATION

5.1 Influence

49% of visitors to Northumberland said a previous visit played a part in their decision to make this trip while 30% were influenced by the advice of friends and relatives.

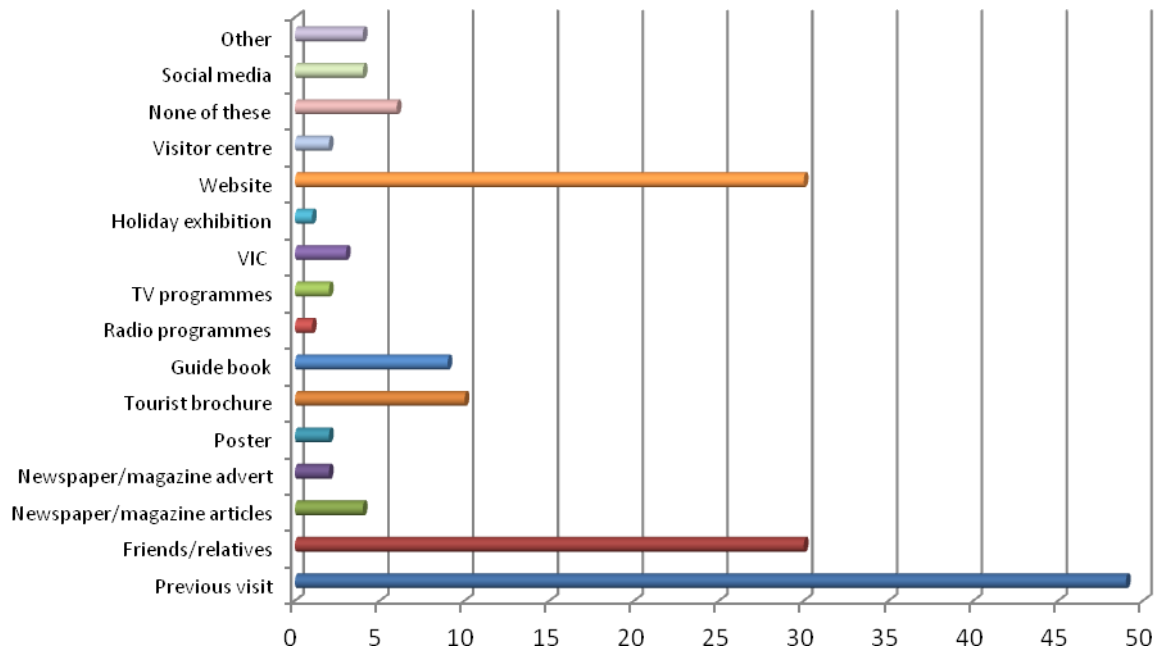


Chart 6: Influences on visit

5.2 Information during the visit

More than half (60%) of the visitors to Northumberland said that they used information while in the area.

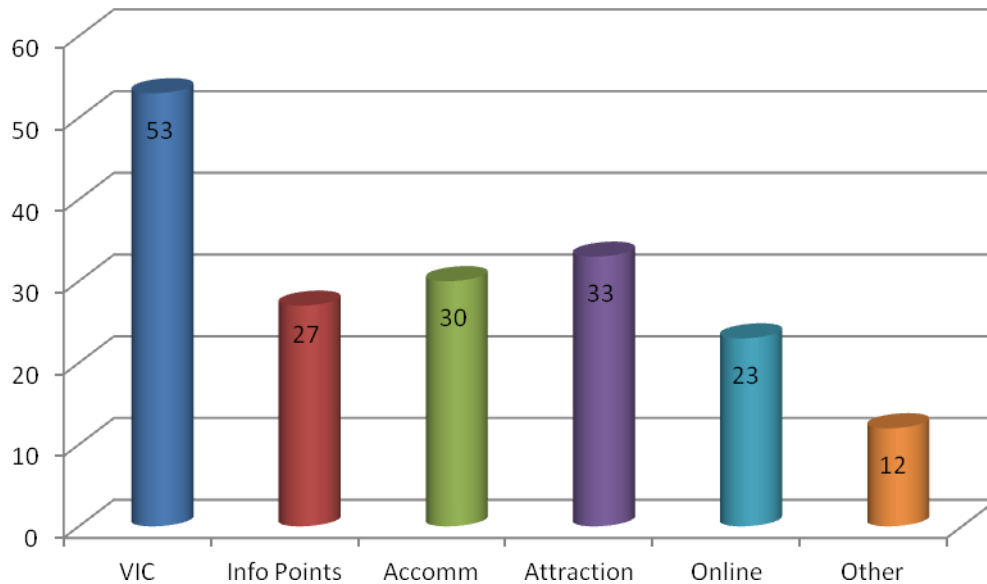


Chart 7: Information during visit

Of those that said they had picked up information more than half (55%) got their information from Tourist Information Centres while 30% found it in their accommodation. 1/5th went online to access information while on holiday in Northumberland through smartphones, laptops and tablets.

Half of all visitors to Northumberland had visited a Visitor Information centre with 25% having made one visit and 16% having visited twice. Of those that had 77% had interacted with the staff.

6. ACCOMMODATION

6.1 Type of accommodation

Visitors to Northumberland continue to take advantage of the fantastic services offered by the non serviced sector with 29% of overnight visitors staying in self catering establishments (26%) and a further 14% using caravan/camping facilities. This is in line with the size of these sectors within Northumberland.

31% of visitors stayed in hotels across the county.

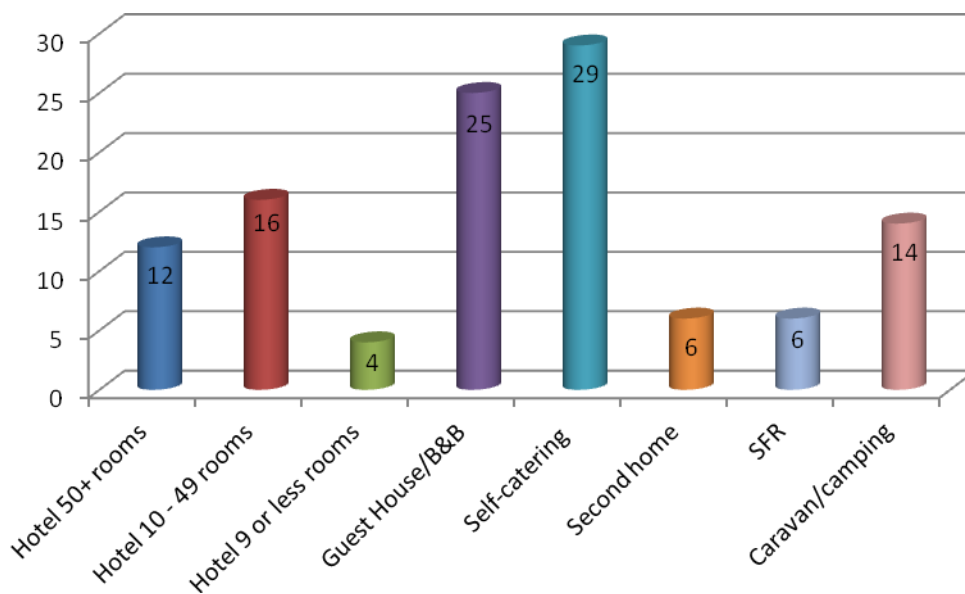


Chart 8: Accommodation Comparisons

6.2 Lead Times

As we can see from chart 8 below almost 30% of visitors booked their trip between 1 and 3 months in advance. 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.

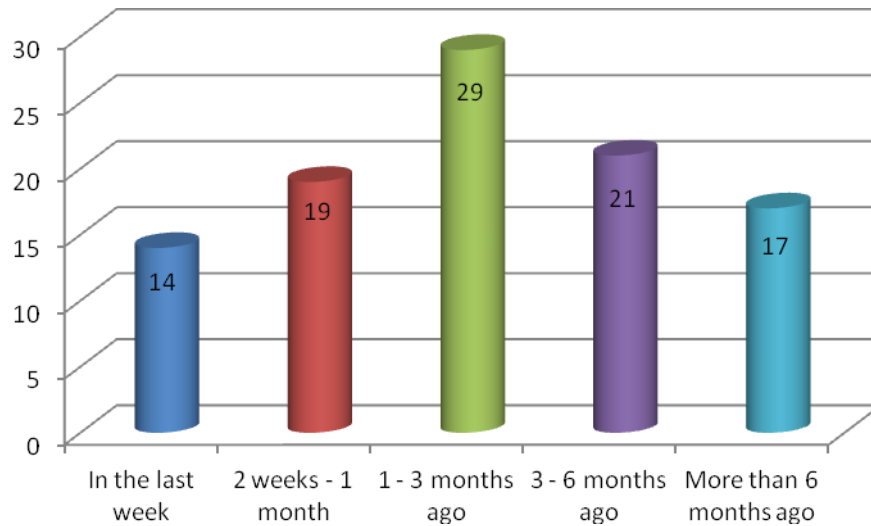


Chart 9: Booking Lead times

This booking pattern is almost replicated in the planning cycle as we can see below. This seems to indicate that once people begin to consider a trip to Northumberland they commit to booking quickly even if this is a long time in advance of the trip.

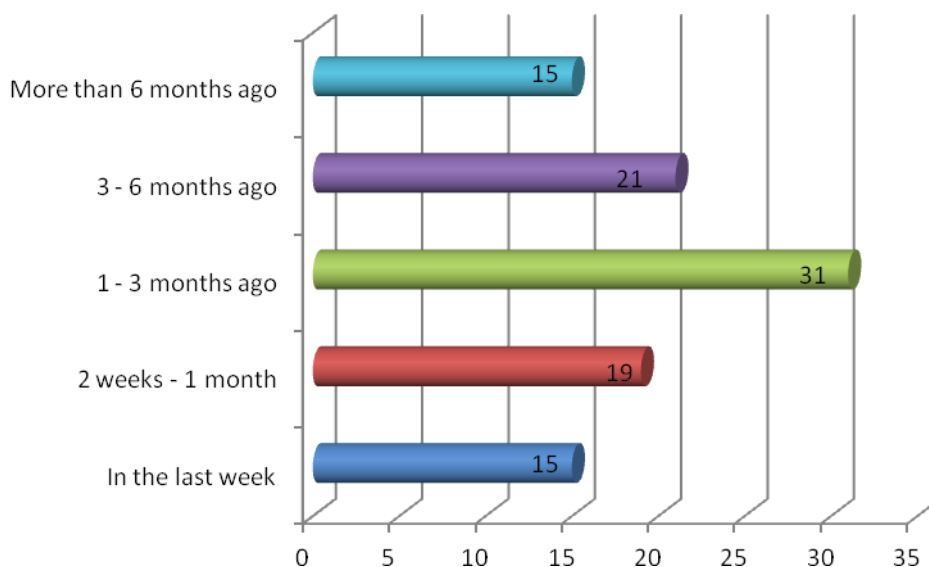


Chart 10: Planning lead times

6.3 Booking Method

Almost three quarters of visitors to Northumberland booked their accommodation directly with the provider, 33% of these booking online.

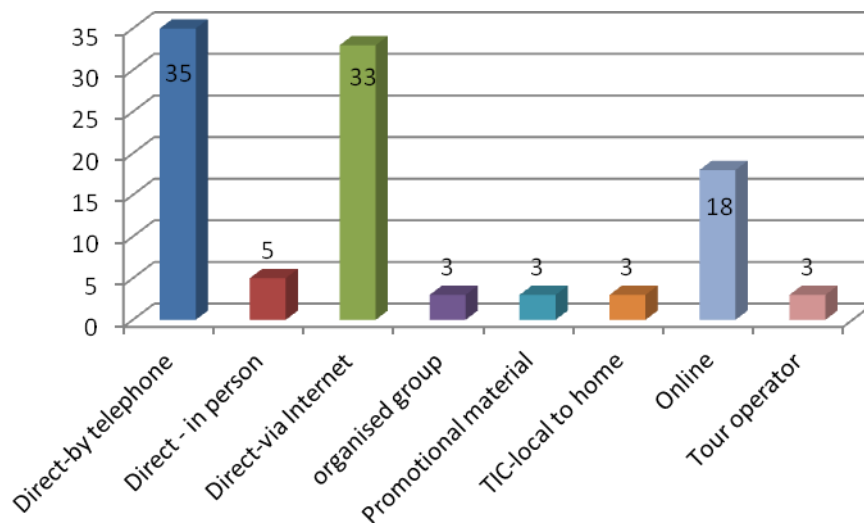


Chart 11: Booking method

6.4 Average Length of stay

The average length of stay for visitors to Northumberland stands at 7 nights, historically we have always seen that Northumberland sees a higher than average length of stay due to the fact more people stay in self catering properties and on campsites

When we look at day visitors, the average length of stay is 6 hours.

7. EXPENDITURE

Average expenditure per person per day in Northumberland was £51.32 compared to £58.56 in 2010.

Looking at different visitor types we can see that day visitors have an average spend of £28.76 while overnight visitors spend £59.82 This fall in overnight visitor expenditure on the levels of 2010 (£65.80) may in part be down to people using caravan and camping facilities rather than self catering flats and chalets reducing their accommodation expenditure.

8. SATISFACTION

To inform product development and identify areas of improvement for Northumberland it is essential that we identify 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.

8.1 Satisfaction with overall visit

1/5th of visitors said that they found Northumberland to be much better than they expected with a further 27% saying they felt it was a little better. 99% of visitors said

they would visit again with the same number saying they would recommend it to friends and relatives.

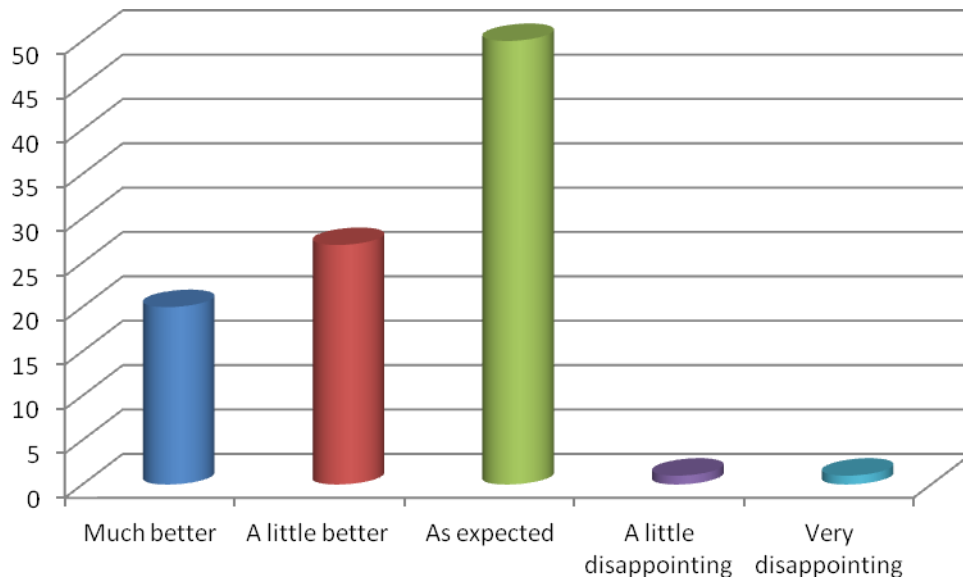


Chart 12: Visit v Expectations

8.2 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 40% rated the quality of visitor attractions as very good. A distinction has been drawn between those who said they rated it as very good as opposed to just good. We need to strive for more people to describe the elements as 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
Road Signposts	4	4	26	44	22
Provision of car parks	3	8	23	46	19
Condition of paths/tracks	3	9	33	44	11
Availability of public toilets	4	10	43	32	11
Cleanliness of public toilets	4	7	45	29	15
Public transport	3	9	38	44	6
Information boards	0	4	26	56	14
Cleanliness of area	0	0	20	55	25
Maintenance of parks/open spaces	0	3	12	57	28
Nightlife	0	15	35	40	10
Variety of things to do	0	0	8	60	32
Quality of visitor attractions	0	0	9	50	41

When given the opportunity to say what they like most about Northumberland in their own words the scenery and the coastline of the county appeared prominently. The full list can be found in Appendix A with the history of the county and the friendliness of its people also coming out highly.

In terms of improvements there were fewer comments with parking being the most common gripe, in terms of both availability and price. The full list can be found in Appendix B.

8.3 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 30% of visitors said the customer service they had received was very good however this differed by sector.

Visitor attractions providers received the highest ratings with 39% of visitors saying they had received very good service while only 21% of visitors said the service received in Northumberland's shops was very good.

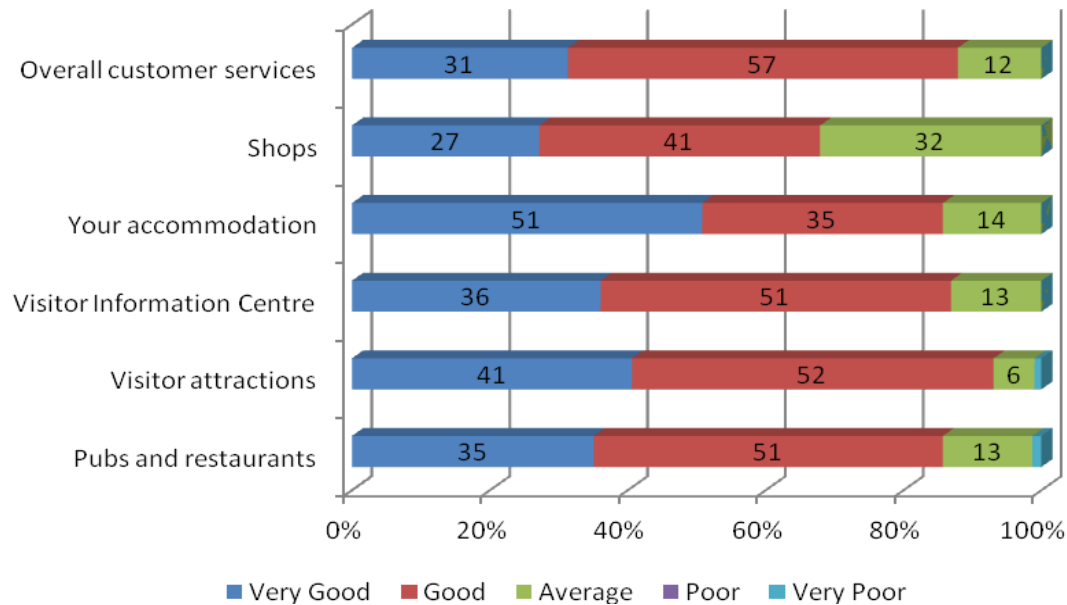


Chart 13: Customer Service

9. VISITOR PERCEPTIONS

To gain a deeper understanding of how visitors viewed Northumberland a series of statements were asked to gauge perceptions of the area. Words such as excellent were purposefully used as we wanted visitors to have a strong opinion. The statements were:

- Information about this area is easy to find/access
- There are lots of excellent cultural attractions in Northumberland
- There are plenty of interesting things to see and do in Northumberland at this time of year
- Northumberland is excellent for eating out
- Northumberland is excellent for nightlife
- Northumberland is excellent for shopping
- Northumberland has lots of excellent visitor attractions based on the history and heritage of the area.
- Northumberland has interesting architecture
- Its coastline and/or countryside is very nice

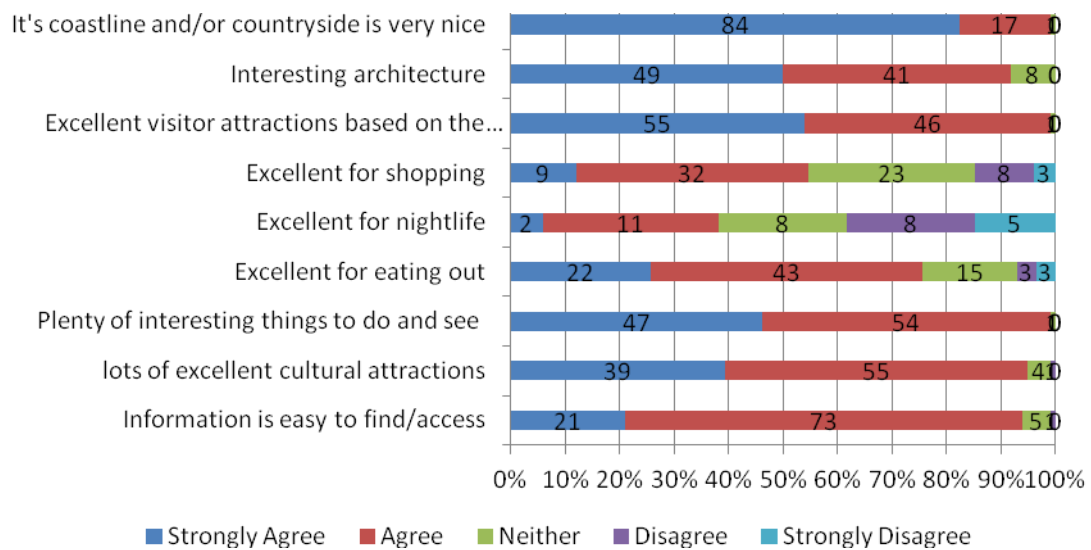


Chart 14: Statement comparisons

What we can see from the statements is that the coast and countryside of the county is highly thought of by visitors with 82% strongly agreeing with the statement 'Northumberland's Coast and/or Countryside is very nice'

Again the attractions of Northumberland receive strong support with 53% strongly agreeing 'Northumberland has lots of excellent visitor attractions based on the history and heritage of the area' and 46% strongly agreeing that there are lots of things to see and do.

Only 2 statements saw disagreement with 3% of visitors strongly disagreeing with the statement ' Northumberland is excellent for eating out' and 5% strongly disagreeing with Northumberland being excellent for nightlife'.

10. RESPONDENT PROFILES

10.1 Age

As we can see from chart 24 almost 3/4 of respondents were over the age of 45 with a quarter over 66.

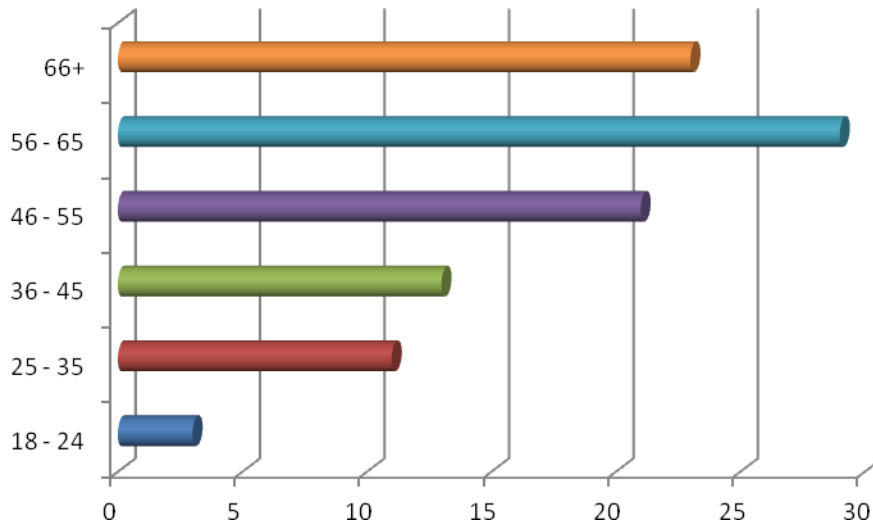


Chart 15: Age profiles

In terms of household income, we can see that 27% of visitors had a household income of between £16 and £25,000. This may be linked to the age range of visitors as they may only be in receipt of pensions rather than salaries. 1 in 10 visitors had a household income of more than £61,000.

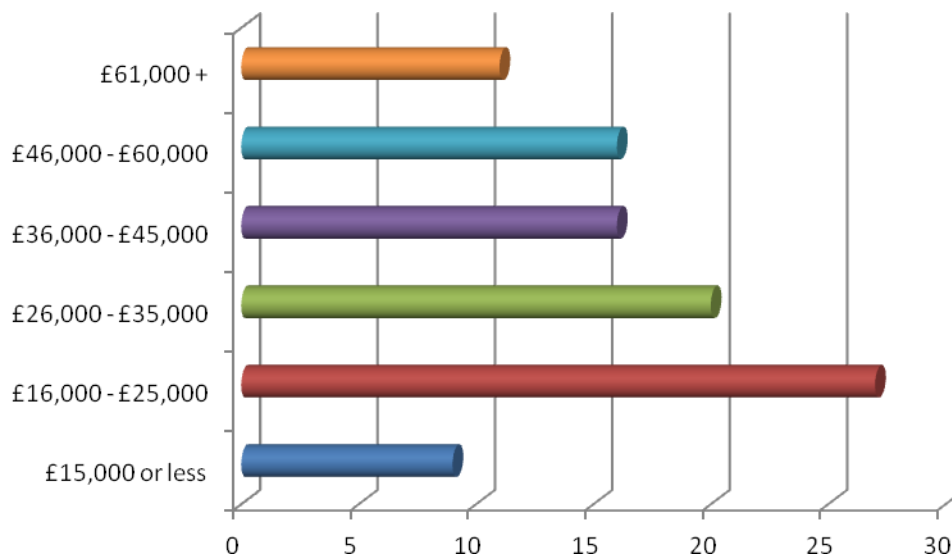


Chart 16: Household income

Appendix A: What did you like most?

Response	count
Scenery	38
Beaches/Coastline	37
History	35
Friendly People/Welcome	28
Countryside	24
Peace and quiet/tranquility	10
open spaces	9
walking	9
Beautiful	5
Good food	4
landscape	4
its beautiful architecture	3
the attractions	2
the weather	2
Variety	2
Visiting family and friends	2
Wildlife	2
it is not too crowded	
Activities	
attractions	
bus services	
cheese	
cheviots.	
Dog friendly	
Environment	
Golf	
I like everything and would like to live here	
inexpensive	
It has everything	
it's an interesting place to visit	
Lots to see and do	
not overcrowded	
rugged terrain	
So far Holy Island.	
Social Activities	
The cycling	
The low cost and it is local	
The unspoilt, open spaces and riding	
Tidy	
Towns	
Various attractions, now I live in Scotland I appreciate Northumberland more.	

Appendix B: Improvements

Response	Number
Cheaper/Free parking	7
The roads e.g. pot holes	7
The Weather	7
Better public transport	5
Better signs	4
More Parking	4
More wi-fi locations	3
A longer stay, there is too much to do and see	2
Cycle paths	2
Better Facilities	
Cost of food	
English heritage and national trust organisation should join together	
Gluten free cake at Woodhorn	
I wish there was more to do indoors when the weather is poor	
Improve the toilets at Bamburgh. Northumberland needs tourists, so make sure the ladies are working!	
in b&b's i WOULD PREFER TO ORDER MY BREAKFAST AT THE TIME - NOT THE NIGHT BEFORE	
Main attractions very expensive- cragside + alnwick castle	
More petrol stations	
More publicity to let people know what is going on	
Shops being open in afternoon especially on the Island	
More things for small children to do	
More walking routes	
Perhaps some guidebooks for castles/attractions could be downloaded from website for a fee so would could read up before visiting	
Shorter grass, so feet dont get so wet	
very little, even the weather was good.	
We love Northumberland as it is	