

ECONOMIC DEVELOPMENT COMMITTEE

16 JANUARY 2019

VISITOR MARKET RESEARCH PROJECT

1.0 Purpose of Report

1.1 To provide the Economic Development Committee with a summary of the 2018 Visitor Market Research Project. The research was commissioned by the Committee for the first time following the recommendation in the Newark Destination Management Plan to improve knowledge of the visitor experience, develop an understanding of who visitors are and what they feel about their experiences. The project was extended beyond Newark to cover the visitor experience at events and destinations in other areas of the district also.

2.0 Background Information

2.1 In order to gain knowledge of the visitor experience and inform strategic decisions around the development of Newark & Sherwood's visitor economy, we undertook a programme of qualitative market research with an external agency in May – September 2018. The methodology comprised 470 face-to-face interviews with visitors across the district. These interviews were conducted at 14 different locations including 3 key events in 2018: Pikes and Plunder; Robin Hood Festival; and Gate to Southwell. This provided a balance of views between those who were visiting to attend specific events and those visiting more generally.

2.2 In addition, the agency provided a smaller online survey of visitors and non-visitors at no extra cost. Although limited, this also provided some useful insight from online respondents in the East Midlands, West Midlands, Yorkshire and Humberside.

3.0 Proposals

3.1 The research provides valuable insight about the visitors. The majority (54%) of visitors were from the East Midlands, followed by Yorkshire and Humberside and the West Midlands. Almost a third of visitors were on their first visit to the District. The main age categories of visitors were 56+ years (43%) and 36 – 55 years (39%). 53% of visiting parties comprised 2 adults only. This profiling can be used to inform the development and targeting of our tourism marketing activity in line with the different aims and objectives of different visitor attractions. For example, we can focus our advertising spend on certain demographic and geographic audiences with the increasing ability to target specific market segments online. We can also take account of the visitor profile in creating copy and imagery that is likely to appeal most strongly to them. This will help to maximise the return on our marketing activity.

3.2 Visitors to Newark & Sherwood rated their experiences very highly. 97% would recommend Newark & Sherwood to a friend, with 30% giving their overall visitor experience 10/10 and 40% rating it "better than expected". Sherwood Forest is the attraction with the highest levels of both spontaneous (48%) and prompted (50%) awareness in the district. This underlines the importance of the developing Destination Management Plan for Sherwood, the development of the RSPB Sherwood Forest visitor centre and links with Newark & Sherwood District Council assets in the vicinity. Such awareness clearly provides opportunities to drive increased footfall to attractions and businesses in the Sherwood Forest area and also to disperse visitors from there to Southwell and Newark.

3.3 In developing and applying our tourism marketing messaging, we will take account of the finding that the strongest positive visitor perceptions are:

- There are lots of cultural and heritage attractions in Newark and Sherwood
- People are friendly and welcoming
- Newark and Sherwood is an easy place to get to

It is also worthy of note that “Cleanliness of the Area” and “Safe” received high visitor ratings of 84% and 87% respectively which shows the value of the district’s Cleaner, Safer and Greener Strategy with regard to visitors as well as residents.

3.4 Whilst visitor satisfaction is high, the non-visitors’ main prompted reasons for not visiting Newark & Sherwood are:

- Not sure what’s there
- Not sure there’s enough to do

Given that these non-visitor respondents were from the East Midlands, West Midlands, Yorkshire and Humberside, this indicates that the main barrier to increased visitor footfall is a lack of profile and awareness of the destination and its attractions. In comparison to other destinations, Newark & Sherwood does not resonate strongly as a destination ‘brand’. This will be addressed with a sustained and targeted tourism marketing plan focussing on 3 distinct but complementary destination brands – Newark, Southwell, Sherwood Forest.

3.5 The average amount of time that day visitors spent in the District was 5 hours and their average spend was £23.68. In comparison, the average spend per overnight visitor was £198.82 with 48% of that being for accommodation. This reaffirms the development of a district-wide visitor offer to encourage more visitors to stay overnight. 37% of overnight visitors were staying with friends or relatives, 35% in a hotel and 14% self-catering. The most popular accommodation location was Newark. Only 31% of visitors agreed with the statement, “There is enough to do in Newark & Sherwood in the evenings (after 5pm)”. Newark & Sherwood District Council is currently reviewing its strategic objectives and looking at the development of the night-time economy in Newark. Feedback was also received from the familiarisation visit in May 2018 that group travel operators require larger, higher quality hotels than those currently on offer.

3.6 The most widely used source for information about Newark & Sherwood prior to visit is the internet. It is also the most widely used source by overnight visitors to find out about and book their accommodation. Therefore, the online experience of Newark & Sherwood’s visitor offer plays a crucial role and one that will only become increasingly important going forward, in promoting the district and its visitor attractions and driving increased footfall and dwell time. Given this priority, a plan will be brought to the Committee in March to develop the district-wide visitor online experience and ensure that it is as engaging and user-friendly as possible.

- 3.7 With regard to greater visitor dispersal, it is worth noting that 25% of visitors picked up information about Newark & Sherwood during their trip, mainly from the attraction(s) visited, followed by their accommodation provider. This reaffirms the benefit of the Visitor Information Centre at the National Civil War Centre and the Southwell Tourist Information Centre at the Minster. It is envisaged that the development of the old toilet block at Sherwood Forest into a visitor gateway will also include provision for printed visitor information. It also suggests that the practice of sharing leaflets and printed information by the attractions and accommodation providers at the Tourism Action Group (TAG) is a worthwhile exercise and that they should continue to explore opportunities for combined visitor offers.
- 3.8 With 80% of visitors travelling to Newark & Sherwood by car, visitor dispersal is largely not dependant on public transport provision.
- 3.9 In planning the timings of our tourism marketing campaigns, particularly around key events, we will take account of the finding that the majority of day visitors planned their visit “in the last week”, whilst most overnight visitors planned their visit between 1 and 3 months prior.
- 3.10 This is the first time we have undertaken such a wide-ranging programme of market research. It has met its key objectives of improving our knowledge of the visitor experience, developing an understanding of who our visitors are, and what they feel about their experiences. The information is valuable for the reasons outlined above but it also provides a benchmark to track progress and explore some of the issues raised in greater depth.
- 3.11 Further to 3.4 and 3.6 above, Members are asked to recommend to Policy and Finance Committee that additional funding of £15,000 per year is included in the Promotion of Tourism budget from 2019/20 onwards to help raise the profile and awareness of the destination and its attractions through an improved online experience. A report on the visitor online experience will be brought to the Committee in March 2019.

4.0 Equalities Implications

- 4.1 There are no equalities implications of this report.

5.0 Financial Implications (FIN18-19/4335)

- 5.1 Additional budget of £15,000 per year is required from 2019/20 onwards to enhance efforts to raise the profile and awareness of the destination and its attractions. This has been included within the draft budget.

6.0 RECOMMENDATIONS that:

- (a) **the Economic Development Committee notes the above findings of the 2018 Visitor Market Research Project;**
- (b) **the Economic Development Committee recommends to Policy & Finance Committee that additional funding required of £15,000 per year is included in the Promotion of Tourism budget from 2019/20 onwards;**

- (c) given its importance as the most widely used source for information about Newark & Sherwood prior to visit, a report on the development of the district-wide visitor online experience be presented to the Committee in March 2019; and
- (d) recommended actions from the forthcoming Destination Management Plans for Sherwood and Southwell be considered in light of the above findings of the 2018 Visitor Market Research Project.

Reason for Recommendations

To maximise the opportunities for developing the district's visitor economy by driving increased footfall and dwell time.

Background Papers

Nil

For further information, please contact Richard Huthwaite, Business Manager – Tourism on Ext 5951.

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