

Business Survey 2015-16

In January 2016 we sent the survey to all businesses in our database, with the incentive of a prize draw to win £100 marketing voucher for all completed surveys.

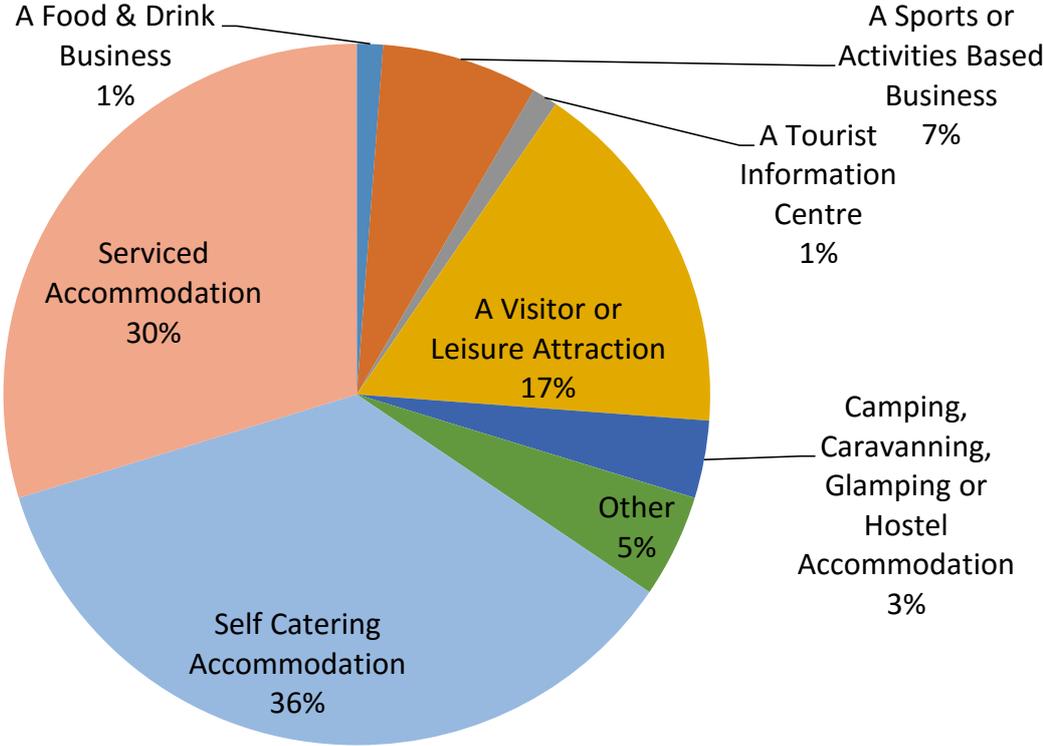
We received 84 complete responses and 13 incomplete. Not all respondents answered all questions, the percentages have been adjusted to reflect this.

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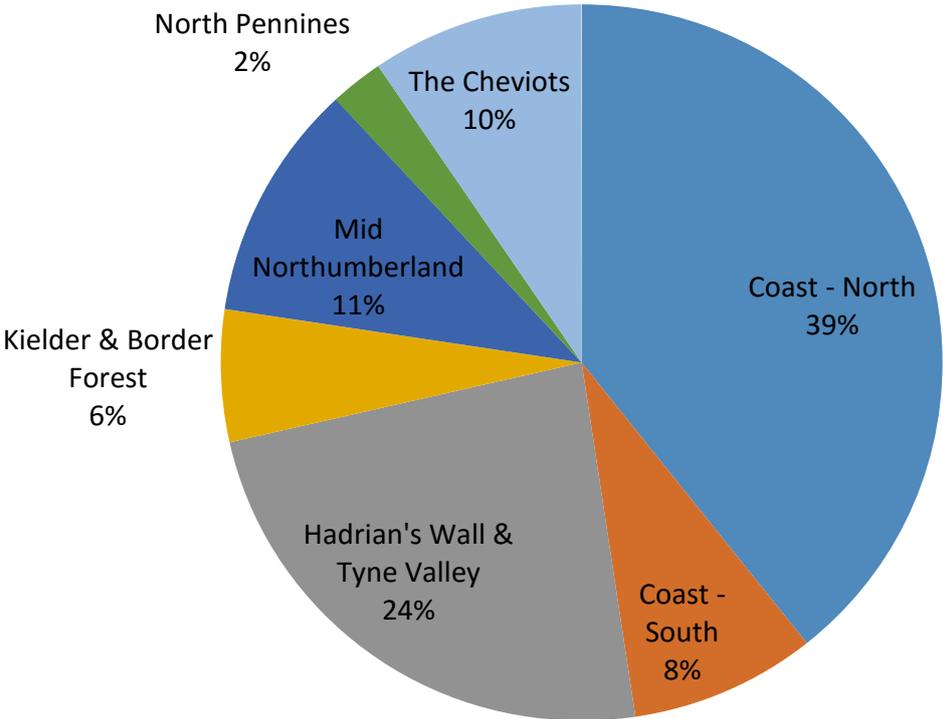
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The Businesses

The graph below shows the types of businesses that responded - the majority being accommodation (69%).

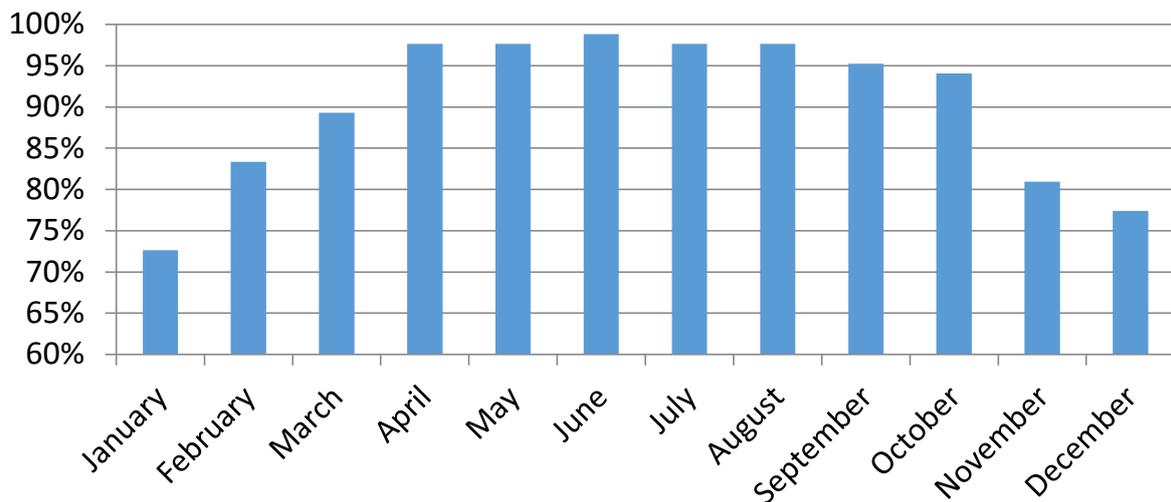


54% said their business is located in a rural area, 35% said coastal and 12% said urban. The graph below shows the geographical spread of businesses that responded.



The Businesses

November, December, January and February are the months when more businesses are closed. 73% said they are open in January, the month with the most businesses closed, though 73% is an encouragingly high figure.



72% of respondents have operated their business for longer than 6 years (up from 65% in the 2014 survey).

The average number of employees per business is 9.5, though 30% don't employ anyone and 49% employ between 1 and 5 people, meaning only 21% of businesses employ more than 5 people.

34% of all businesses are not quality assessed, for accommodation only, 24.6% are not assessed.

When asked what percentage of food & drink used in their business is locally sourced, the average answer was 70.8%. Challenges cited around using local food & drink included; cost, lack of consistency of supply, distribution and lack of suppliers generally.

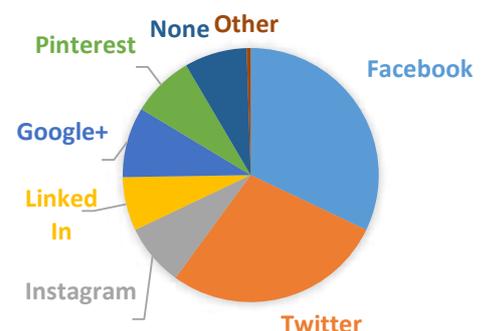
Online Presence

90% of businesses have a website. Those who don't cited cost, lack of need and lack of confidence using computers as reasons for not having a website.

63% of businesses are able to take bookings or sell tickets online, 40% have the booking system on their own website, whereas 23% use a third party booking agent.

74% of businesses use Facebook and 65% use Twitter, with other social media channels being used less for business. This may be an area where businesses could benefit from training.

21% of businesses said their business is on TripAdvisor but don't do anything with it, and 30% said they don't use TripAdvisor at all. 41% of businesses respond to reviews and 11% use TripAdvisor's booking system.



Accommodation

86% of accommodation providers offer short breaks.

20% said their visitors stayed longer in 2015 compared to 2014, only 4% said they stayed for less time.

Around 34% of stays were booked within a month of the stay, over 70% of stays were booked less than 6 months ahead of the stay. This is depicted in the chart below.



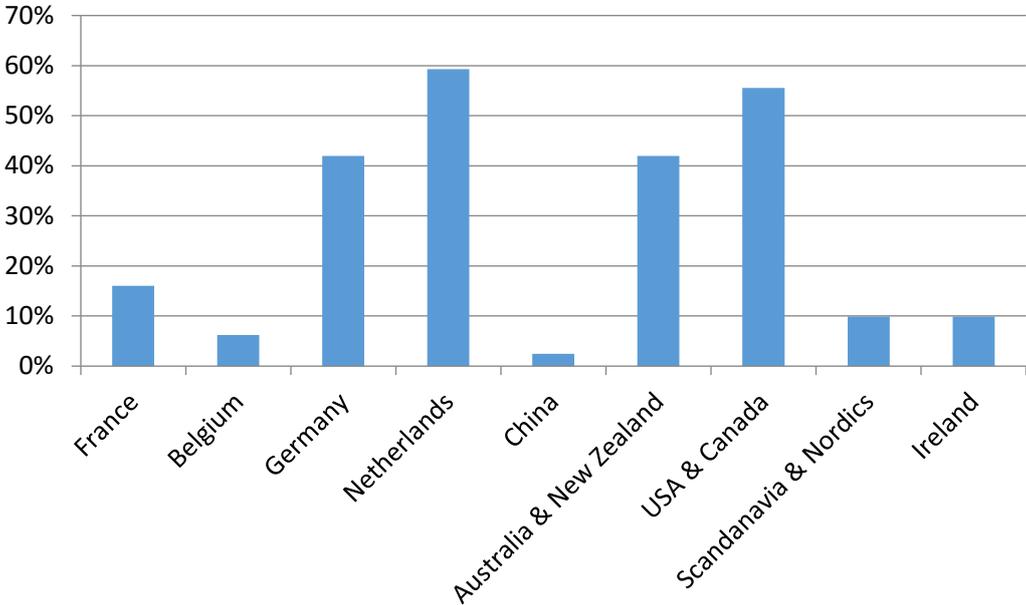
49% of bookings were made online, with a further 24% by email and 21% by telephone. Over 6% of bookings are made during a previous stay.

On average, 30% of bookings are repeat visits.

Visitors

On average, businesses said 13.3% of their visitors come from outside the UK, however 48% said 0-5% of their visitors are from outside the UK.

When asked to name the top 3 countries/areas their international visitors are from, the Netherlands came top, followed by USA & Canada then joint third was Germany and Australia & New Zealand. All of these destinations are target markets for the Northern Tourism Growth Fund.



Performance in 2015

56% said the number of visitors they received in 2015 has increased compared to 2014. 13% said it has decreased. Those who have seen a decrease cited bad weather, having to put up prices and visitors spending less as reasons. Increases in visitor numbers were thanks to a number of reasons; improvements to the business' offer, increased marketing, using online booking agents, Northumberland becoming more popular, higher profile thanks to TV coverage.

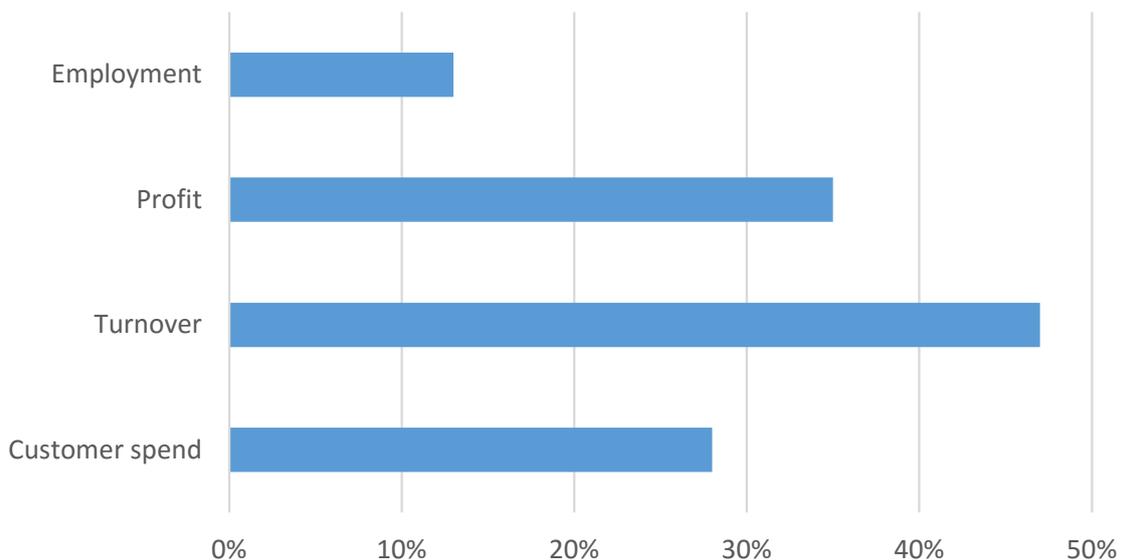
Only 28% said visitor spend went up in 2015, though 22% said they don't know, so there may be a lack of understanding around assessing visitor spend.

47% said business turnover increased, compared to 7% saying it decreased. Only 35% said their profit increased, reflecting an increase in running costs.

No one said they decreased the number of staff they employ, 13% said they increased the number of employees in their business. 22% said they encountered problems trying to recruit staff, the main reasons given were a lack of skilled and qualified staff, and problems around rural areas and public transport.

29% of respondents now believe business is better than pre-recession, with only 10% saying they feel it is worse.

Increased in 2015



68% said Tales from Northumberland had a positive effect on their business. Only 6% said all the TV coverage Northumberland has benefitted from has not affected their business.

When asked if any events in 2015 had a positive impact, answers included the Rugby World Cup, Kielder Observatory, Tour of Britain, Anniversaries and outdoor events such as Kielder Marathon and group challenge walks.

Northumberland Tourism

47% said Northumberland is promoted well or very well as a tourist destination, 16% said poorly or very poorly. When asked to comment, the overriding feedback was that due to a lack of funding there are limitations on the reach and impact Northumberland Tourism’s activity can have. There was a recognition of more activity in PR and social media, however comments were made comparing Northumberland with Visit Scotland and Yorkshire who have much larger budgets and a higher profile as a result.

The chart below shows the average score for each area out of 5, 5 being the highest score.

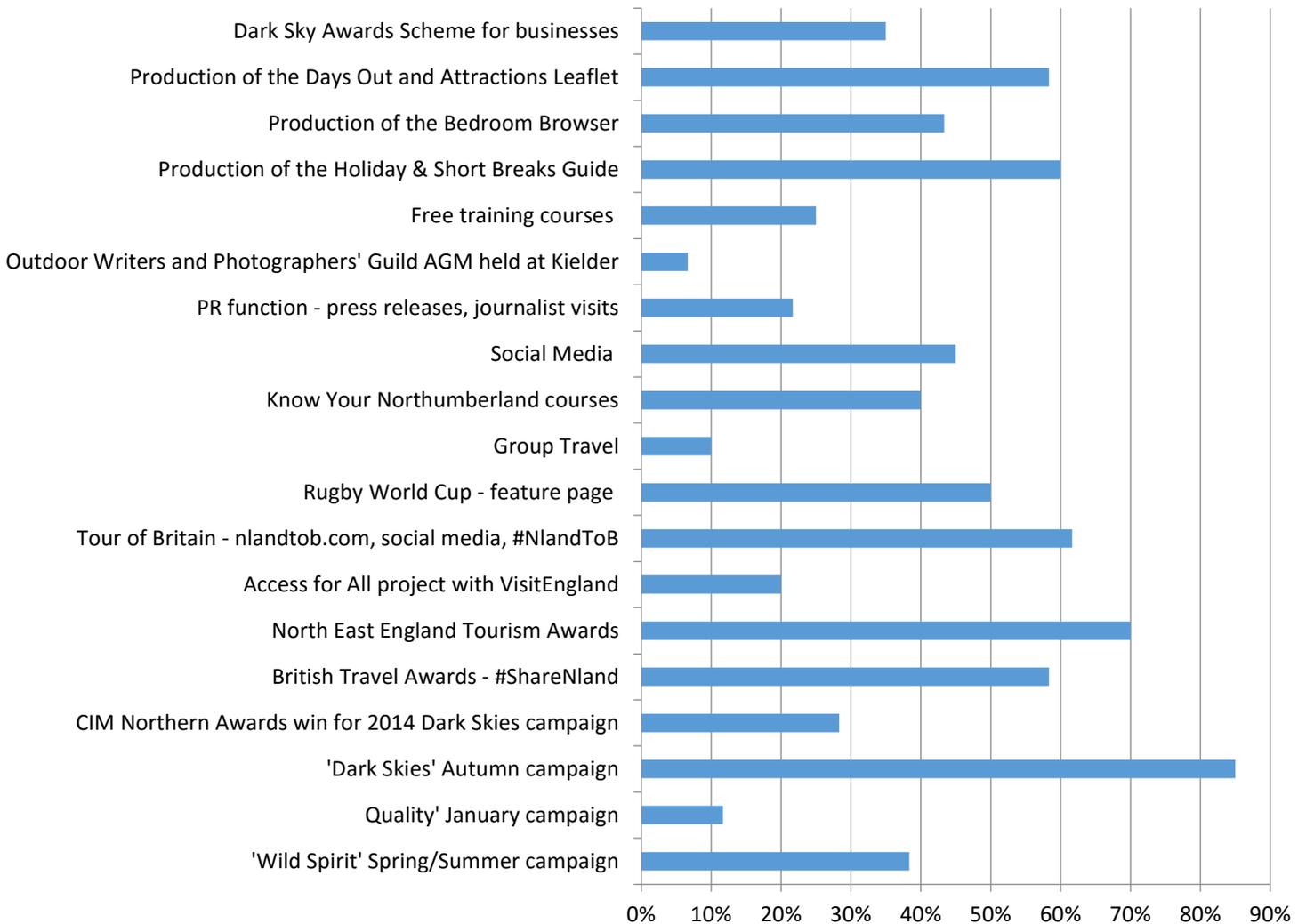


When asked what activity they would like to see Northumberland Tourism undertake in future, answers included; a cohesive national programme, advertising internationally, promoting off peak times, continue what NT are doing just do more of it, more video, more TV coverage, promote different aspects, more PR perhaps focussing on bloggers, vloggers etc.

When asked how well Northumberland Tourism communicates with businesses, 51% said well or very well, with 15% saying poorly or very poorly. We asked them which methods of communication they prefer, direct emails came top, followed by email newsletters and meetings.

Other comments about Northumberland Tourism included; keep up the fantastic work, concerns that if you are not a large business or don't advertise with them you are ignored, our marketing is good but website is becoming out of date and that staff are very helpful.

Northumberland Tourism



The chart above shows the percentage of respondents that were aware of various activities that Northumberland Tourism or Active Northumberland have undertaken in 2015.

Projects which have involved more business participation have scored higher, such as the Dark Skies campaign, North East England Tourism Awards and the British Travel Awards.

There is still less awareness of the Bedroom Browser than the other two publications, and more work is needed to communicate to businesses about work done that hasn't needed county-wide business participation, such as PR in general, the Access for All project and the smaller Quality campaign.

Learning & Actions

The majority of businesses have been operated by the same people for at least the last 6 years, meaning they were around during the time of One North East and could still have misconceptions about Northumberland Tourism or resentment around the changes to funding.

A large percentage of businesses use their own booking system, meaning we will not be able to connect directly via visitnorthumberland – indicative availability could be looked at again.

A large percentage of businesses use Facebook, but much less use the likes of Instagram, Google+ etc, so there is a potential training need there.

International markets quoted by businesses seem very much in line with those targeted in NTGF, therefore to capitalise on the work started in those countries, if we are to do any international marketing those markets would be the best choice to start with.

A third of visits are booked within a month of the stay, so last minute marketing is potentially worthwhile and could have an immediate impact.

There is a need for skilled and qualified staff in the tourism industry in Northumberland, however challenges around seasonality and rural areas need to be addressed. Work has already been done and is continuing with Northumberland College to look at these issues.

TV coverage has without a doubt had a positive impact on Northumberland's tourism industry. More of this would be fantastic, and we have another series of Tales from Northumberland to come, so this must be capitalised on. Increased use of video, albeit not on television, may help continue the trend of the public discovering the beauty of Northumberland.

Events are also evidently having a positive impact, though smaller local events across the county are just as important as the large one-off events. For many of our small businesses, a yearly event bringing 100 people to an area and filling the accommodation for a period is just as beneficial as a one-off large event a few miles away which they might get people staying for.

Many businesses want to develop their offer but can't work out the finances. More communication around the funding available for businesses would be beneficial and perhaps a yearly or twice a year workshop to bring together funders and businesses interested, giving them the chance to feed back to us about what projects they need funding for so we have more knowledge to take into discussions when forming new funding stream criteria.

Very few businesses use the Independent Spirit branding, or are aware that they can use it. Some work needs to be done to increase awareness and knowledge around the brand to increase its use and impact.

The main feedback around Northumberland Tourism's activity was that it is good but needs more budget to have more impact. All avenues are being explored to find more budget for marketing. Only 51% said Northumberland Tourism communicate well or very well with businesses. The most preferred method of communication is direct email. We have started making changes to include more direct contact, however more could be done, along with changes to ViewpoiNT to make it more useful.