

# Challenge

## Research Developing the Visitor Economy

January 2024

Rural  
Design  
Centre

@NGinitiative



## Contents

1. Introduction
2. Data opportunities for Northumberland
3. Who we are
4. Our experience
5. Our approach
6. Data and evidence touchpoints
7. Innovations in market research
8. Inclusive market research
9. Indicative costs
10. Northumberland's research hub



## Introduction

We're excited by this challenge because we, the research team at NewcastleGateshead Initiative (NGI), are a small group of tourism *and* research professionals.

NGI is a destination and inward investment agency for NewcastleGateshead and the wider region.

When we're not delivering client work, our focus is collecting and using data and evidence to inform and develop strategies to support sustainable, inclusive and high-quality visitor experiences in Newcastle, Gateshead and North East England.

We understand the kinds of qualitative and quantitative research Northumberland needs to ensure the development of infrastructure, services and experiences that will be enjoyed into the future as well as reach new and currently under-represented communities.

Living and working close by, we're also familiar with the area, and we have previous experience of visitor research for Northumberland, including Visit Northumberland's visitor survey and current client English Heritage's Berwick Barracks project.

From Northumberland's Destination Management Plan, we know some key opportunities have been identified that can push forward the data, evidence and intelligence the county requires to deliver the plan. We have outlined these on the next slide as context to our proposal and as key considerations within the range of data and methods we would recommend for Northumberland's research programme.

# Data and evidence opportunities for Northumberland

Northumberland is in an important phase for tourism management with increasing focus on sustainable strategies and ROI from limited funding a driving factor.

Northumberland's current Destination Management Plan identifies some key opportunities to improve data, evidence and intelligence within the county's visitor economy.



## COLLABORATION

A joined-up approach to data collection and intelligence sharing to inform and improve marketing strategy and provide a wide range of metrics to help measure return on investment, satisfaction and perceptions, and social, economic and environmental impacts.



## BUSINESS BAROMETER

A regular business barometer to increase understanding of how the industry is performing.



## SUSTAINABILITY DATA

New tools and techniques to monitor visitor pressure and footfall / flow to help protect natural spaces and heritage.



## COMMUNITY

Engagement with parish and town councils to monitor community perceptions of tourism and improve communications with residents.

# Who we are

A local research team whose specialism is tourism



## Research Manager

David Bowe

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Project manager  
Tourism research  
programme designer



## Research Executive

Jade Galloway

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Data analysis &  
reporting  
Event evaluation



## Director of Visitor Economy

Ian Thomas

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North East Destination  
Development  
Partnership pilot lead



## Head of Market Insights

Shelley Johnson

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Chartered Marketer  
20 years in tourism &  
culture

Between us we have a massive amount of experience in applying research and intelligence methodologies to inform tourism strategies. We're all members of the Market Research Society and the VisitEngland research group. You can read our full bios at [ngi.org.uk/ruraldesigncentre](https://ngi.org.uk/ruraldesigncentre)

## Our experience

We have used our experience as tourism and destination practitioners to support a number of destinations and attractions with their ambitions to better inform their marketing and development plans. Particularly relevant client work includes:

Audience research for **Northumberland Museums Group** with a focus on examining audiences and understanding non-visitors. This included a separate survey for under-21s and focus groups with under-represented audiences.

**Visit Northumberland's** visitor survey, analysis and report. In 2021 this included over 400 face-to-face surveys within Northumberland as well as 3,000+ online survey completions.

An extensive research project for **Visit Leeds** which included 1,200 leisure visitor surveys, domestic and international online consumer surveys and business visitors survey.

Research work for English Heritage providing insights into potential visitors to the redeveloped **Berwick Barracks** site and testing concepts for interpretation. Almost 6,000 people provided feedback to the project, incl. around 40 in small focus groups.

STEAM reporting for the **North East England local authorities**.

### CLIENT FEEDBACK

"Visit Northumberland has relied on the coordination of Newcastle Gateshead Initiative's research team to provide key statistical information relating to the Northumberland visitor economy for a number of years. Their analytical expertise has helped us to understand visitor motivations, behaviours and demographics and we continue to work with them to calculate the annual volume and value of the visitor economy and its contribution to Northumberland's wider economic base. We have no hesitation in recommending them to inform the data and insight needs of any entity working within the sector."

**Neil Carney, Head of Destination Strategy, Visit Northumberland**

You can read more about our work with Visit Northumberland, English Heritage, Visit Leeds and Northumberland Museums group at [ngi.org.uk/ruralsdesigncentre](https://ngi.org.uk/ruralsdesigncentre)

# Our approach

As tourism professionals we have an in-depth understanding of the various data and evidence needed to make decisions within DMOs and visitor attractions.

Tourism priorities are changing, and data collection methods are evolving. It's vital that destinations and attractions can pull together and interpret an increasing range of metrics. **We believe we are uniquely placed as tourism research professionals located in North East England to be the hub that connects all the visitor economy research spokes for Northumberland.**

We're excited about new innovations that can add to existing data sets, complementing traditional methods which provide essential first-party feedback and shouldn't be forgotten.

The following three slides explore our approach further, looking at visitor journey data touchpoints, which make up a significant number of Northumberland's visitor economy research spokes; introducing innovations that are adding to these touchpoints or making them easier to analyse; and exploring the factors we consider when designing an inclusive research programme.



# Customer journey map

DATA & EVIDENCE TOUCHPOINTS

## DATA & EVIDENCE

PRE-AWARENESS

Perceptions research\*

- Online advertising audience profile
- Search data from Google Analytics
- Surveys & focus groups with non-visitors

AWARENESS

Marketing performance. Can help identify target markets. Depth of insight into why some people don't visit.

\* Quantitative data accessed via research panels. Tells us how destinations are perceived by those with little awareness.

- Search data from Google Analytics
- Website traffic, dwell time etc.
- Social listening

CONSIDERATION

This is particularly useful marketing data, giving insights into what attracts attention, what leads to bookings & popular content / the best marketing tactics.

- OTA bookings data via Data Appeal
- Flight bookings data via Data Appeal
- Feedback from travel trade.
- Website traffic, dwell time etc

BOOKING

Forward bookings helps us predict future performance.

- Number of visits to attractions (e.g. via T-Stats system)
- Footfall data via Huq
- Accommodation occupancy & rates (e.g. via T-Stats)
- Visitor surveys
- Social listening

VISIT

Measuring visitor volume and value. Surveys give us a wealth of data including motivations, satisfaction, average spend and modes of transport used. Understanding visitor flow.

- Sentiment & volume of online reviews
- Post-visit surveys
- Focus groups with visitors

POST VISIT

Event / attraction economic impact studies. Sentiment towards destinations & attractions. Aspects of the destination / attractions that are creating +ve / -ve sentiment. Feedback from under-represented communities.

WHAT WE USE THE DATA & EVIDENCE FOR



# Innovations in market research

NEW TOOLS WE CAN INVEST IN TO INFORM PLANS AND ACTIVITIES

## HELLO LAMP POST

Automated 2-way comms platform via users' mobile phones.

Helps users find their way and provides feedback channel

## HUQ

Using mobile & satellite data to understand visitor footfall, density and flow.

Have new parks and spaces product.

In touch with NNPA.



## DATA APPEAL

OTA bookings, flight bookings, volume of reviews & sentiment in one dashboard.

New sustainability section. Visit Northumberland and NGI currently have access.

## SOCIAL LISTENING

Analysing social media content to understand perceptions & motivations.

Wordnerds are in-region experts in this field.

## Inclusive market research

People from under-represented communities often have **different needs and motivations**. They also might not be so frequently found in the usual places we recruit for market research respondents. Observed data such as social listening can help us uncover new perspectives but it's important to also actively recruit people from under-represented communities for more traditional research methods such as surveys and focus groups.

This will ensure an inclusive market research programme that can help us design products and services for everyone. The research process itself can also have reputational benefits if feedback is listened to. **Autistic and disabled people** in particular are often attracted to brands which have made the effort to listen to them in designing their products and services and can become loyal to these brands.

When we were delivering work for Northumberland Museums Group they were particularly keen to hear from under-represented communities. As part of the project, we recruited a series of focus groups with harder to reach groups, such as young people in deprived areas and people with learning disabilities. The groups added real depth of insight into visitors and barriers to visiting for our client.

**International visitors** represent a whole range of communities which may have different motivations and expectations to domestic audiences. It's unlikely that face-to-face surveys or surveys to Northumberland's databases would capture representative samples of each of their key international markets. Via panels, we can access audiences within target market countries to test their perceptions and experiences, motivations and needs. We have recently done this for two of Leeds' target markets – Ireland and Netherlands.

## Indicative costs

Below we have put together costs for the key roles that NGI can play in research design, data collection, analysis and reporting. If shortlisted and successful in our pitch, we would work with you and your budget to design a research programme featuring a range of traditional and innovative data tools and methodologies.

Service	Cost	Recommendation	Cost per year
100 face-to-face visitor surveys*	£1,000	600 between spring & autumn	£6,000
Online visitor survey including design, set up & hosting	£3,500	Annually	£3,500
Focus group – delivery and write up	£1,500	Five per year	£7,500
Focus group incentive - per group of 10	£300	Five per year	£1,500
Focus group – recruiting under-represented groups	£30**	20 people per year	£600
Focus group - room booking & refreshments	£200	Three per year (two online)	£600
Zoom 1-2-1 depth interviews (x10)	£1,500	Annually with key businesses	£1,500
Analysis and reporting	£1,800	Quarterly	£7,200
Presentation	£1,200	2 per year	£2,400

\* Covering key tourism areas of Northumberland  
\*\* Cost per individual recruited

## Northumberland's research hub

We're excited by this challenge because we can see the potential for bringing fresh innovation into Northumberland's research programme.

We'd love to be part of the team, continuing our work providing valuable visitor insights via surveys and focus groups, and combining these with all we can glean from the full range of touchpoints along the customer journey - the traditional, the modern and the innovative (where budget allows), to provide Northumberland with easy-to-digest learnings and recommendations at regular intervals.

Northumberland is a beautiful county with some fantastic visitor experiences. Providing tourism data and insights is our area of expertise and we think we can contribute a great deal as you work to develop an inclusive and sustainable visitor economy in Northumberland.

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