

# English Heritage

## Berwick Barracks Visitor Research 2017

*Nick How*

October 2017



Mill House  
North Street  
York, YO1 6JD  
Tel: 01904 632039



# Contents

- Background, Method and Sample
- Profile of respondents
- Visitor behaviours
- How and when planning a trip
- Reasons for not visiting Berwick in the last 12 months
- Visitor experiences of Berwick
- Feedback about Berwick Barracks
- Conclusions

# Background, method & sample



# Background

## Purpose of the research

The results of the research will be used to identify the market opportunity for the development of the visitor economy in Berwick-upon-Tweed

## Research objectives

- To provide tangible insights that can be used to develop a rich and successful visitor strategy for the town
- To inform the development of sustainable and relevant visitor related products, services and infrastructure – including the Barracks as a cultural heritage hub and focal point.

## Fieldwork period

- 24<sup>th</sup> August – 30<sup>th</sup> September 2017

# Method and sample

- A total of 445 completed surveys achieved from 25 face to face interview shifts
- 10 interview shifts took place at peak time in August
- 15 interview shifts took place off-peak in September
- The survey was designed by Qa and approved by English Heritage
- Interviewing took place across a mix of weekday and weekend shifts
- The table below shows the spread of interviews by location, peak and off-peak

| Location            | Interview shifts | Peak surveys | Off Peak surveys | Totals surveys | Total % |
|---------------------|------------------|--------------|------------------|----------------|---------|
| Berwick Barracks    | 5.25             | 29           | 41               | 70             | 16%     |
| Berwick Town Centre | 9.75             | 80           | 88               | 168            | 37%     |
| Alnwick             | 4                | 41           | 40               | 81             | 18%     |
| Bamburgh            | 2                | 20           | 20               | 40             | 9%      |
| Lindisfarne         | 2                | 22           | 22               | 44             | 10%     |
| Melrose             | 1                |              | 21               | 21             | 5%      |
| Eyemouth            | 1                |              | 21               | 21             | 5%      |
| <b>Total</b>        | <b>25</b>        | <b>192</b>   | <b>253</b>       | <b>445</b>     |         |

# Method & sample explanatory notes

- Actual interview 'hit rates' were slightly lower at Berwick Barracks than planned and compared to other locations
- Interviewers reported that Berwick Barracks, Melrose and Eyemouth had considerable lower footfall and therefore fewer visitors to take part in interviews than other locations
- The interview team for Berwick Barracks often relocated to the town centre finding visitors to interview there were more numerous than at the Barracks
- Our fieldwork suggests Berwick town centre's footfall is relatively healthy but the footfall at Berwick Barracks, especially off-peak is significantly lower

# Statistical confidence & how to read the data

- The overall total of 445 completions provide a sample which in research terms means we can be 95% confident that the data at an overall level has a variance of no more than +/- 4.6% accuracy
- Therefore the findings at an overall level are based on a sample size inside the +/- 5% standard industry error rate required to provide statistically robust findings
- NB: The overall research findings are a reflection of the sample who participated in the survey
- Please note that when interpreting results throughout this report not all percentages will equal 100% due to rounding (with any figures of 0.5 or higher being rounded up).
- Where the figure is shown as 0% at least one respondent gave this answer but the total count makes up less than 0.5% of the overall total; a blank shows no-one has given this answer
- Some questions were multiple response questions: respondents had the option of giving more than one response. These percentages may be higher than 100%
- The base (i.e. the number of people answering the question) is shown after the actual question wording, at the bottom of each slide
- Please note that the base varies as some questions were only asked to some respondents depending on previous answers given



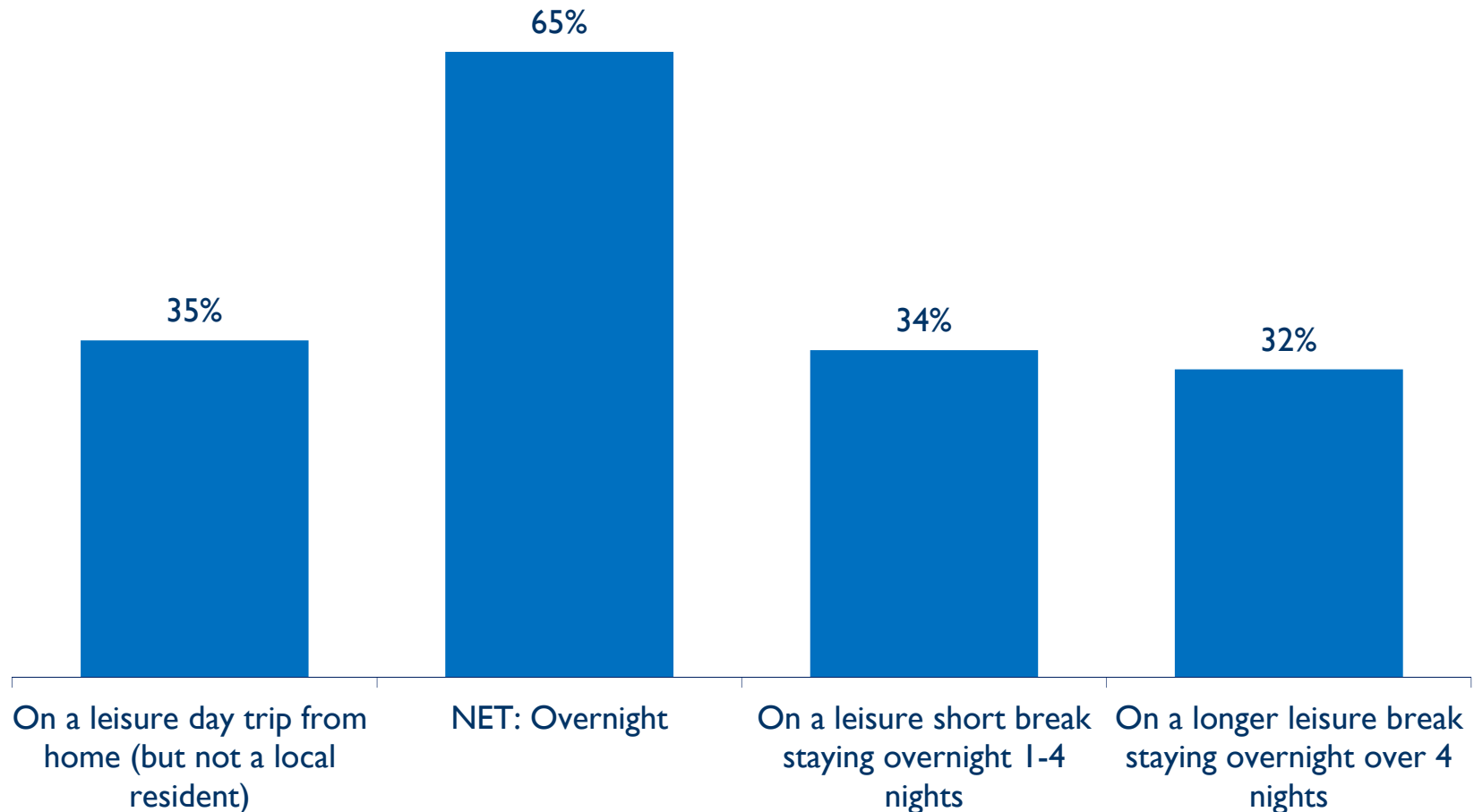
# Profile of respondents





## Visitor types to the region split almost equally into different categories

### Q1. Describe your visit today



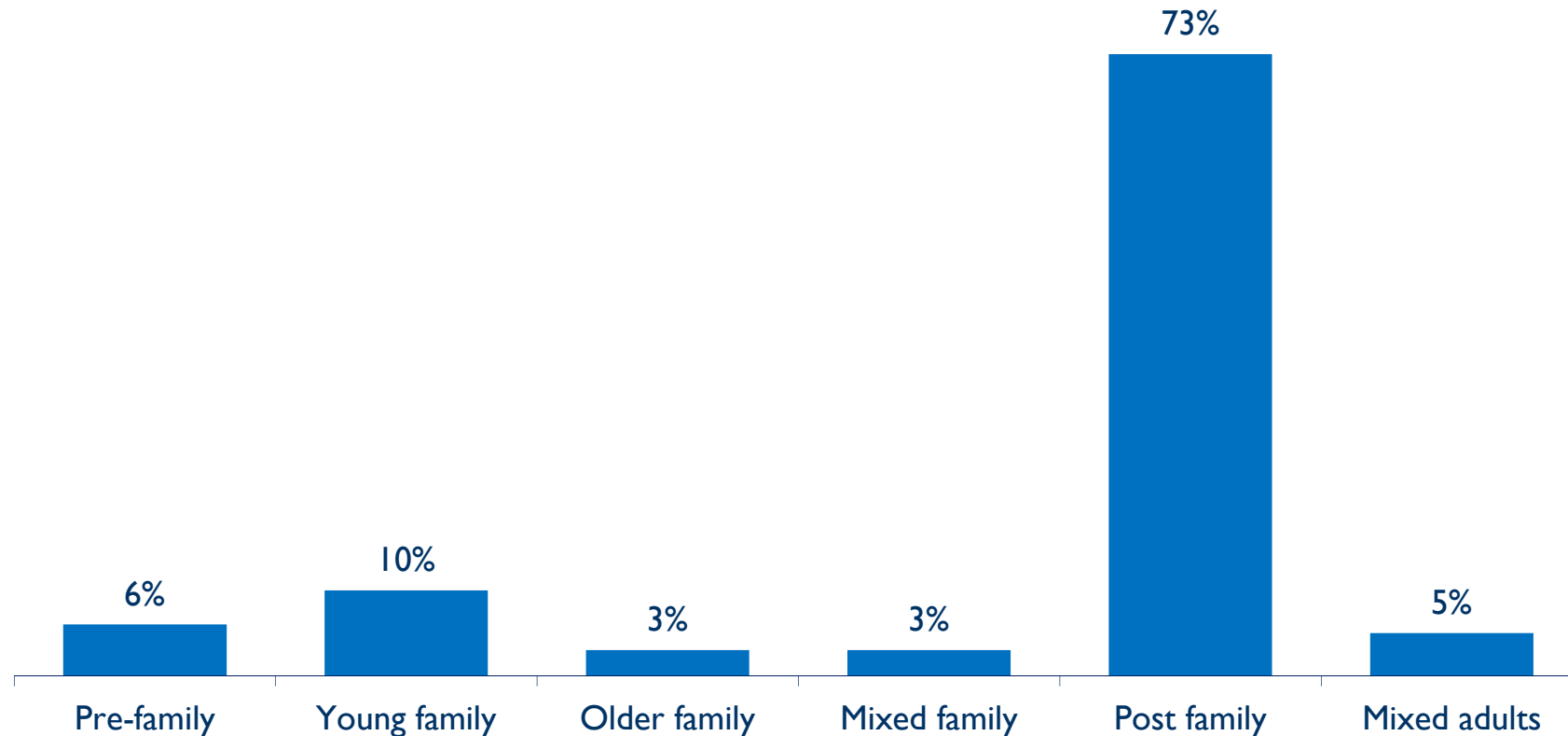
- Higher proportion of visitors on longer stay in peak period (41% compared to 25%)
- Higher proportion of visitors on a short break in off-peak period (43% compared to 21%)

Q1. Which of the following best describes you / your visit today? Base: 445 [any local residents screened out]

## Majority of visitors to the region are older adults without kids

- 16% of visitors had children under 16 (18% peak and 14% off-peak)

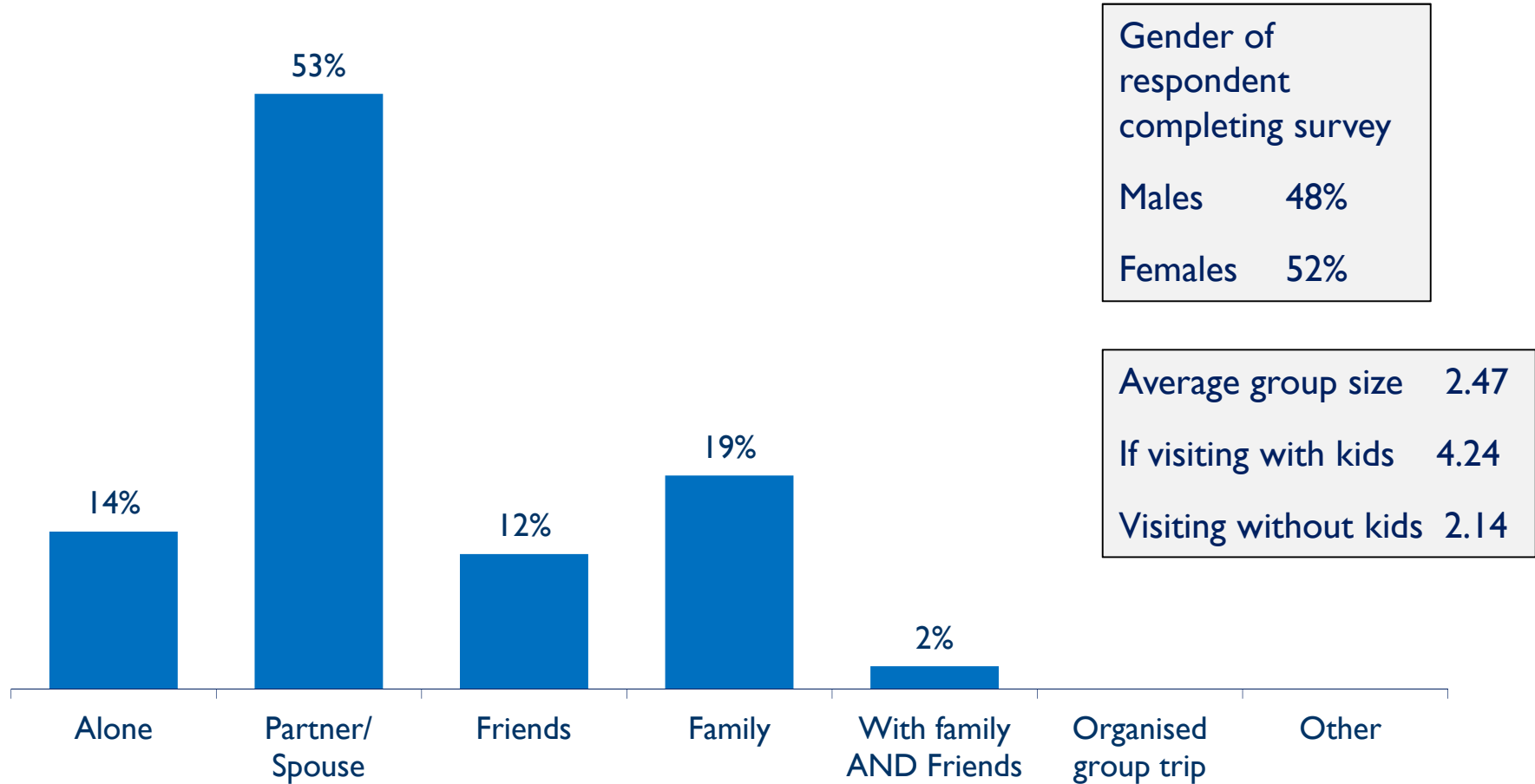
### Q27. Lifestage



Q27. Please can you tell us your age and the age of all the other members of your party? Base:322 (Pre-family no kids and are all adults under 34; Young Family all kids up to 10; Older family all kids 11 to 15; Mixed family mix kids under 10 and 11 to 15; Post family no kids all adults 35+)

# High proportion visiting region as a couple or alone

Q26. Who visiting with

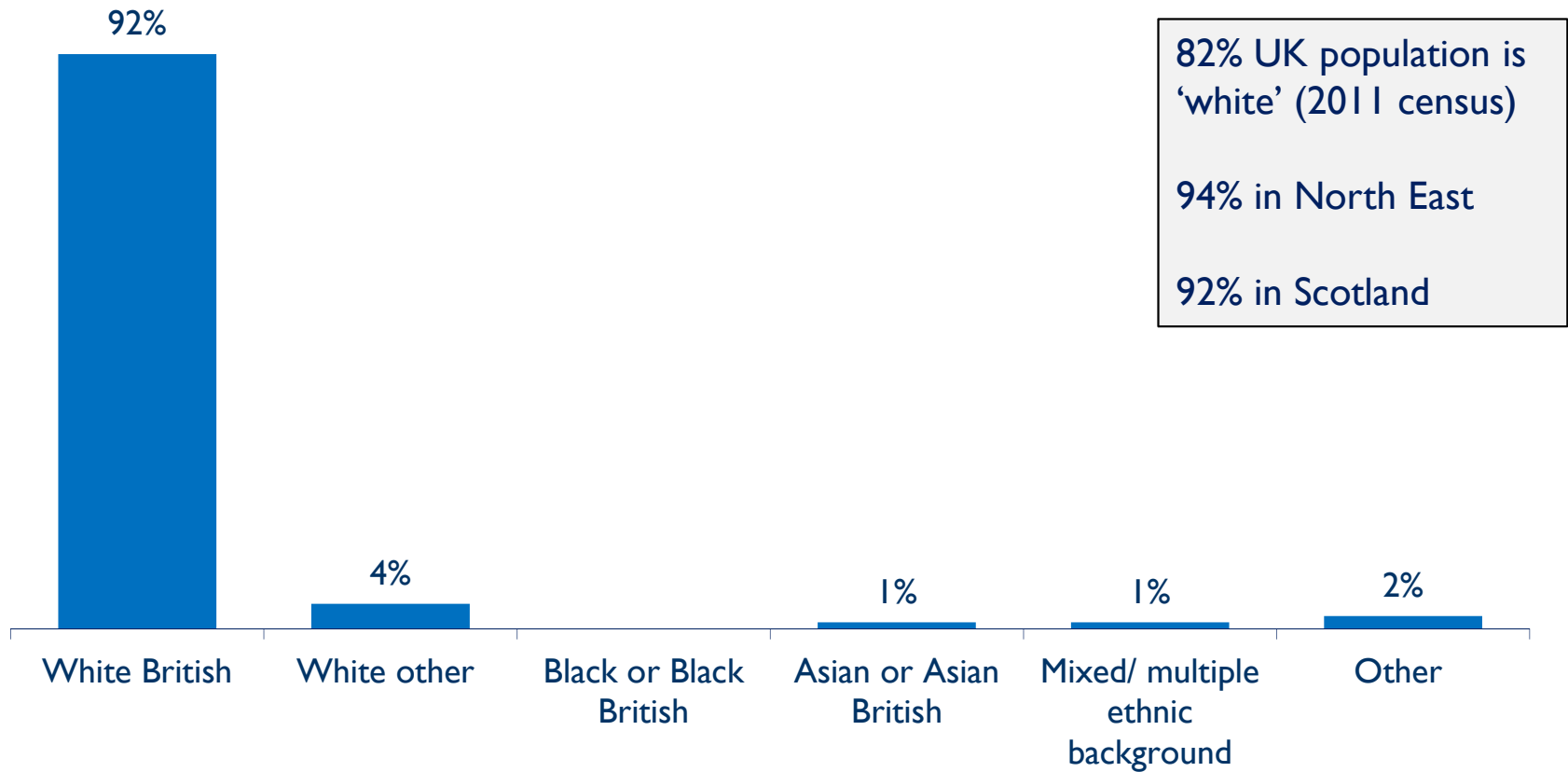


Q26. Who are you visiting with today? Base: 445  
Q24. Gender of respondent Base: 445



# Proportion of visitors who are 'white' is similar to that found in the population in the North East and Scotland

## Q25. Ethnic origin

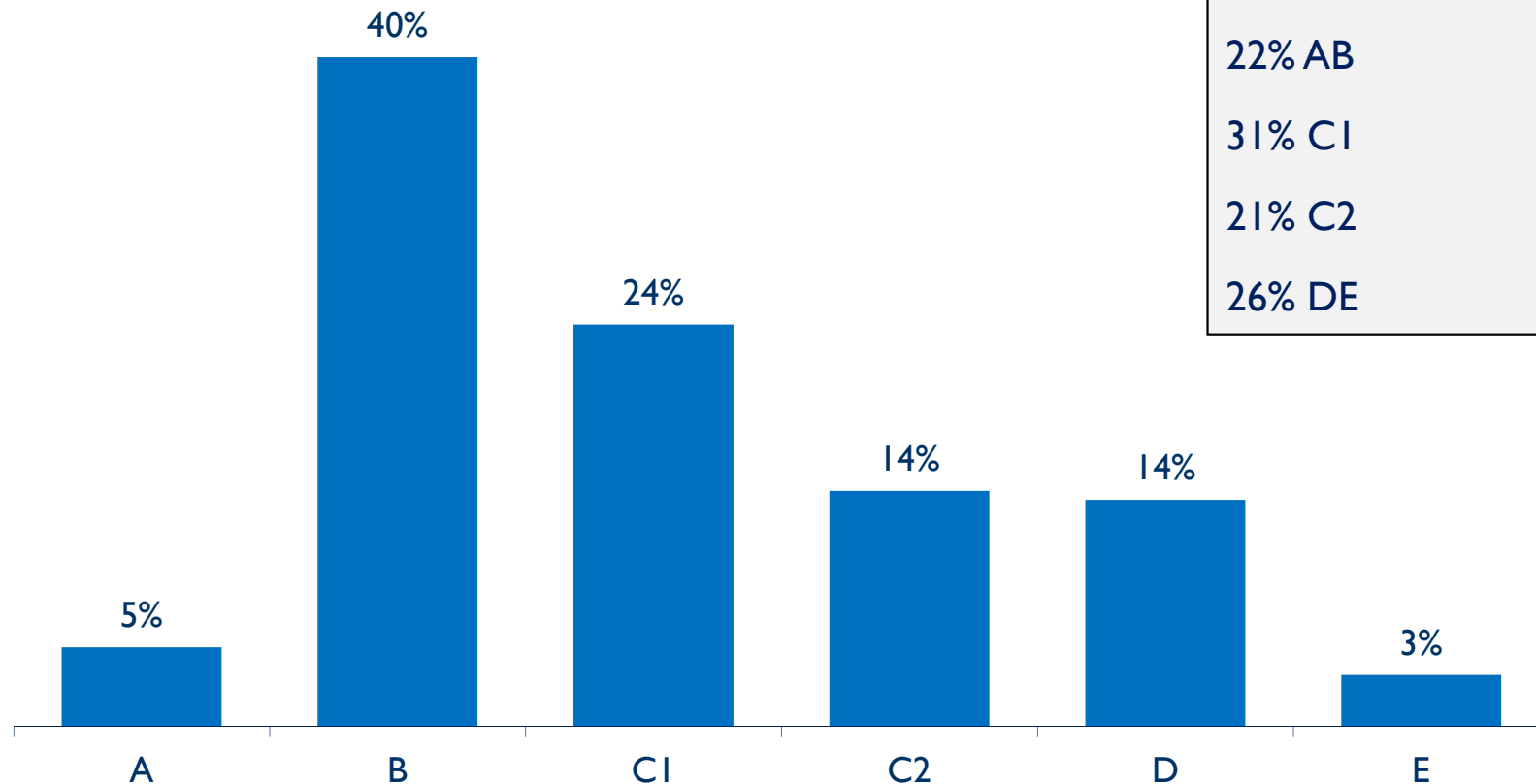


Q25. How would you describe your ethnic origin? Base:445



## Region attracts a higher proportion of visitors from higher social grades than found in the population at large

Q28. Social grade



53% UK population is 'ABCI' (2011 census)

22% AB

31% CI

21% C2

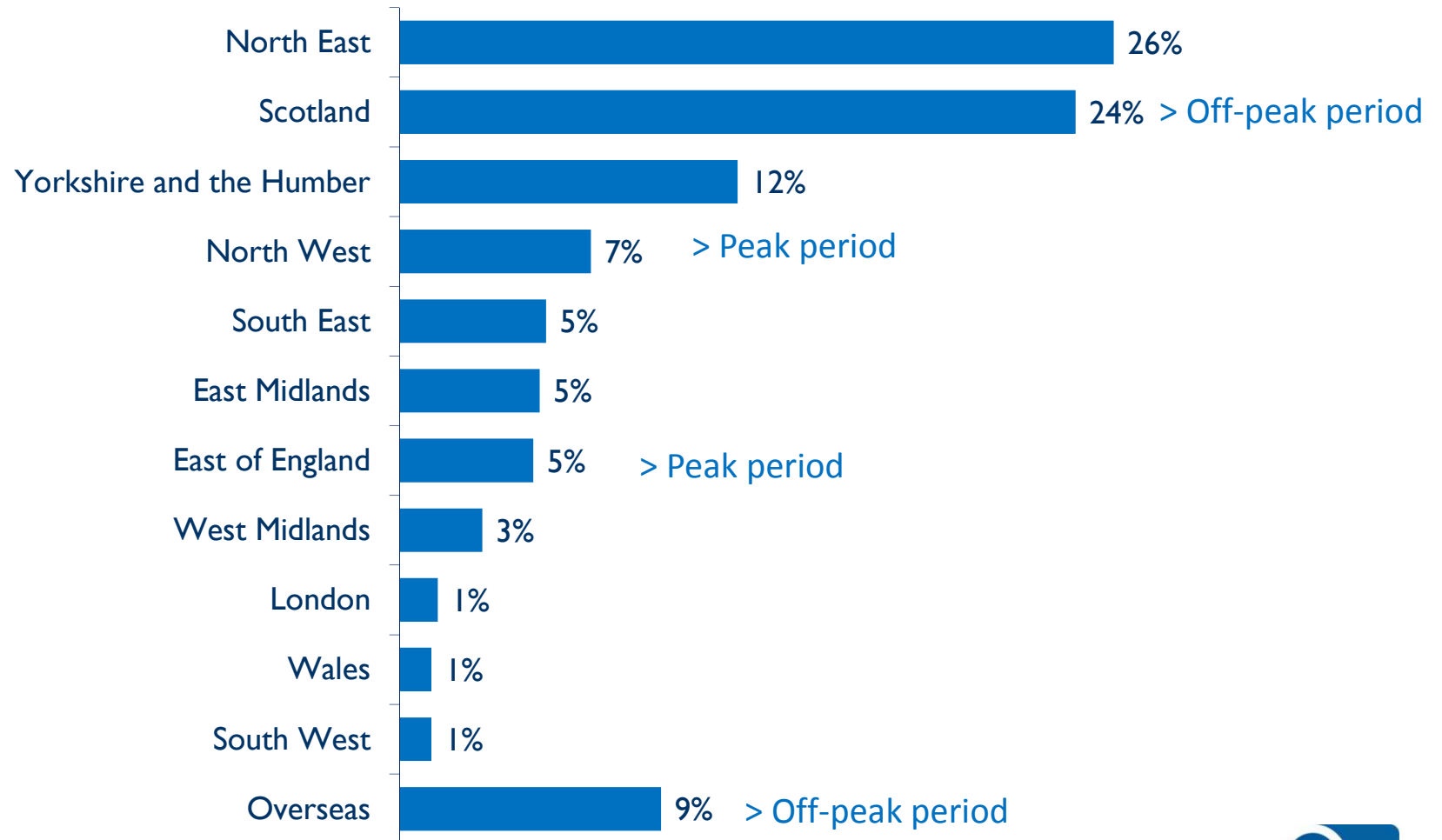
26% DE

Q28. What is the occupation of the head of your household / chief wage earner? (If retired, please give the previous occupation and write 'retired' before the occupation) Base: 360 (amongst those who gave a valid answer)



# The region attracts visitors from a wide range of geographic areas

## Q29. Origin of visitors

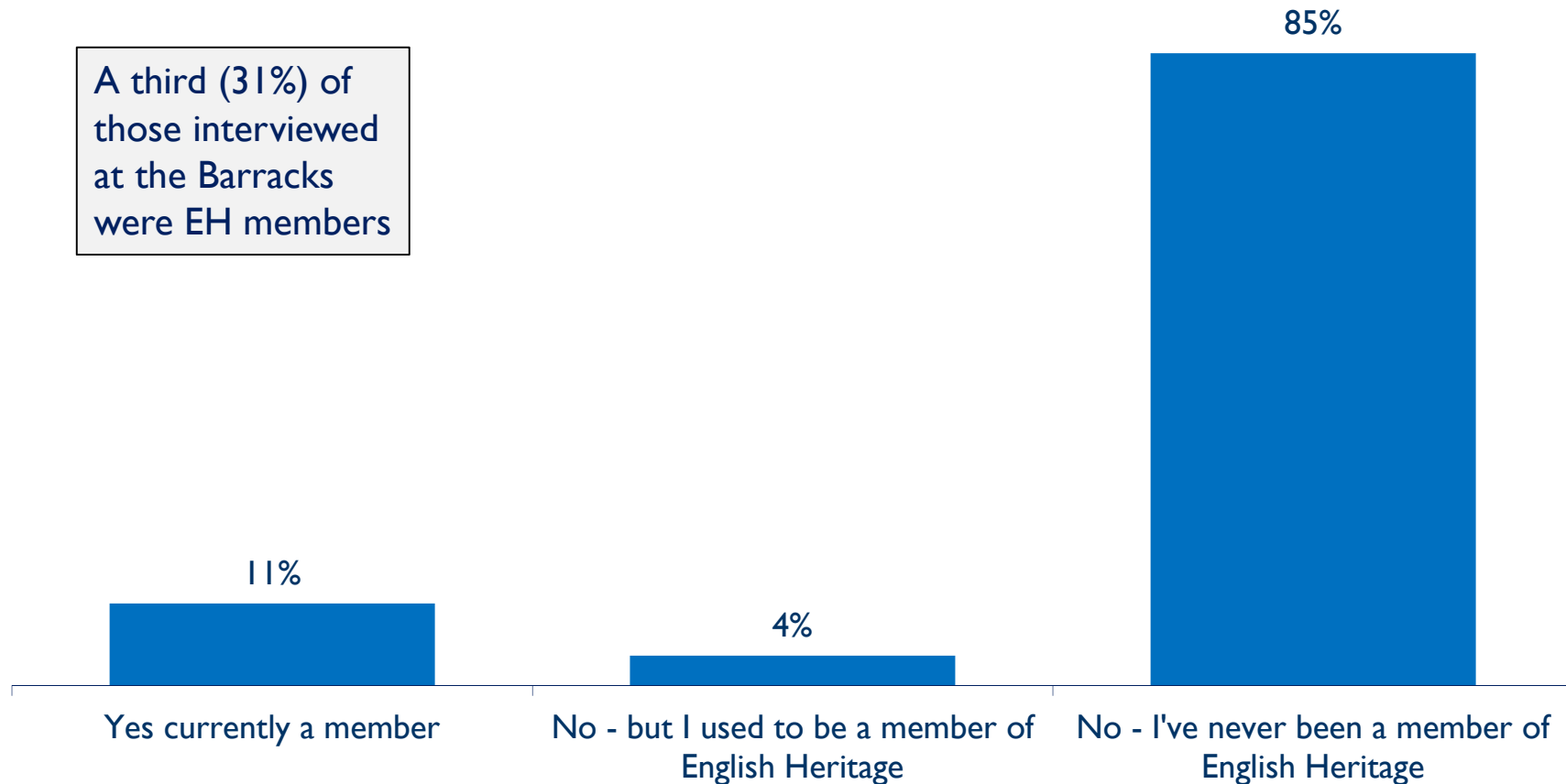


Q29. What is your postcode? Base: 437

# English Heritage members themselves not sufficient to drive a significant increase in visitors to Berwick and the Barracks

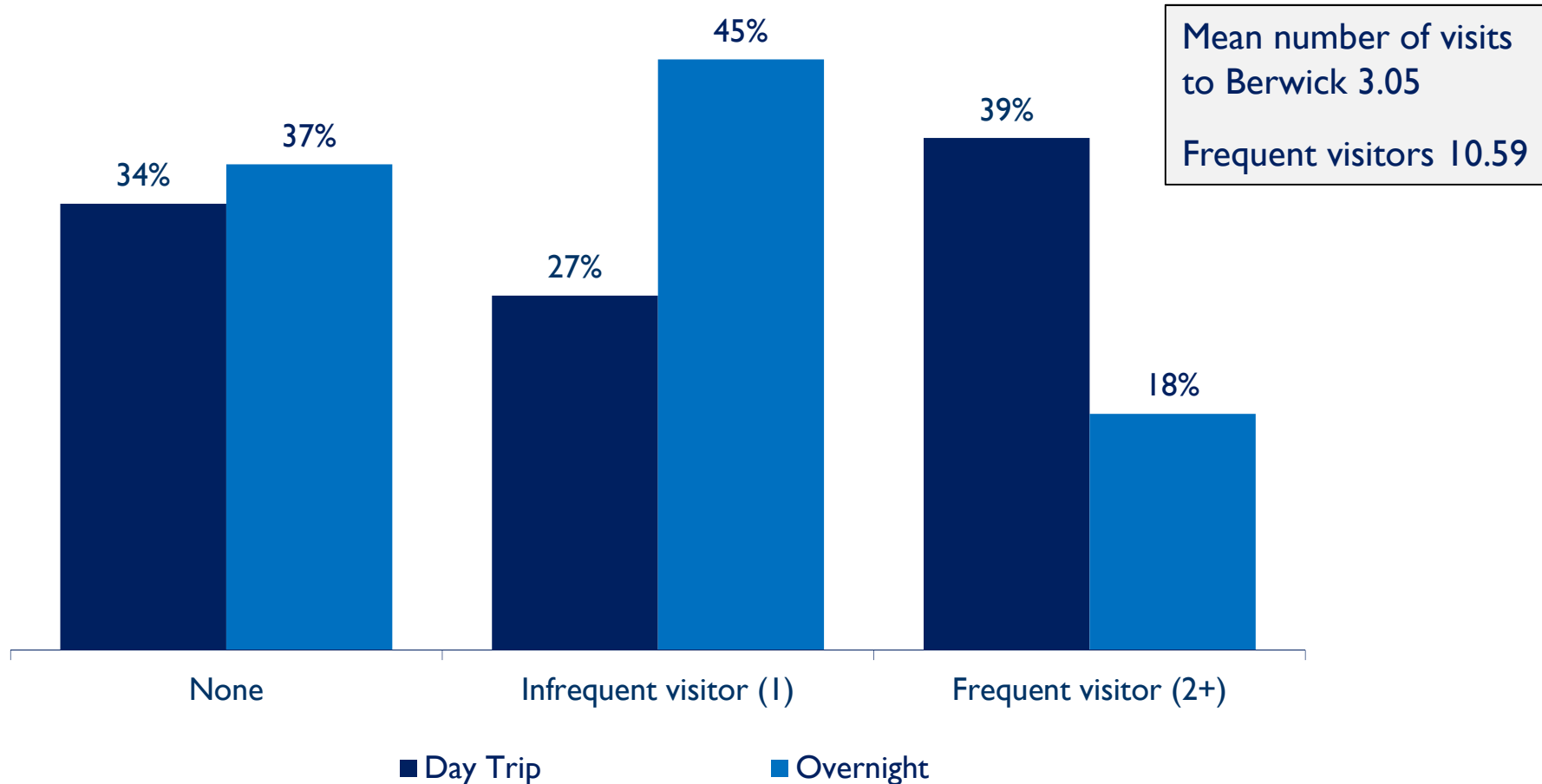
## Q23. Membership of English Heritage

A third (31%) of those interviewed at the Barracks were EH members



## Berwick has a loyal cohort of visitors but clear scope to attract more people who are already visiting the region

### Q2. Number of times visited Berwick in last 12 months



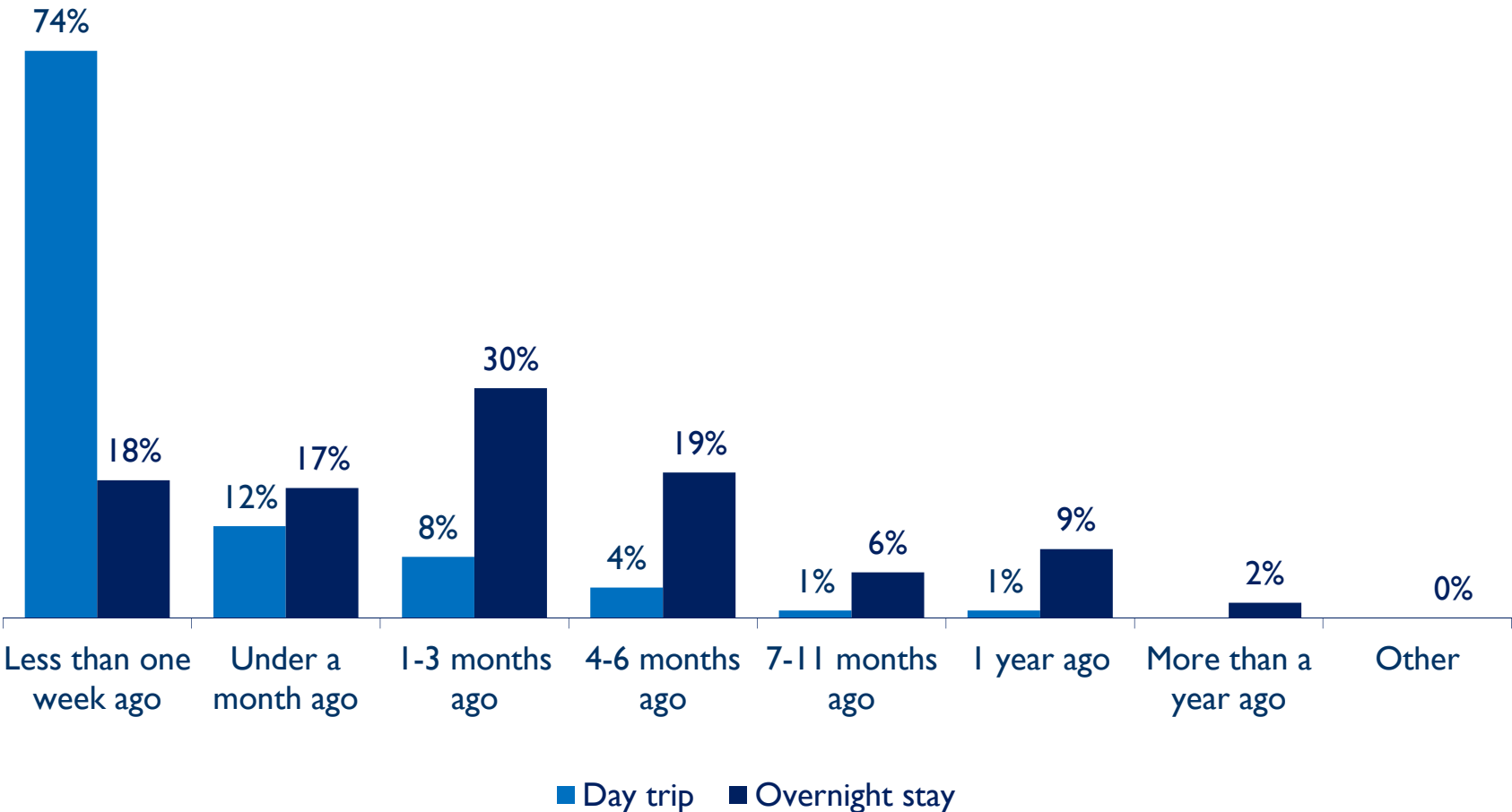
Q2. Approximately, how many times have you visited Berwick-upon-Tweed in the last 12 months? Base: 445 (154 Day) (291 Overnight)

# How and when planning a trip



# Marketing required to both sow seeds about Berwick when visiting the area and also prompt short term decisions

Q7. When plan trip



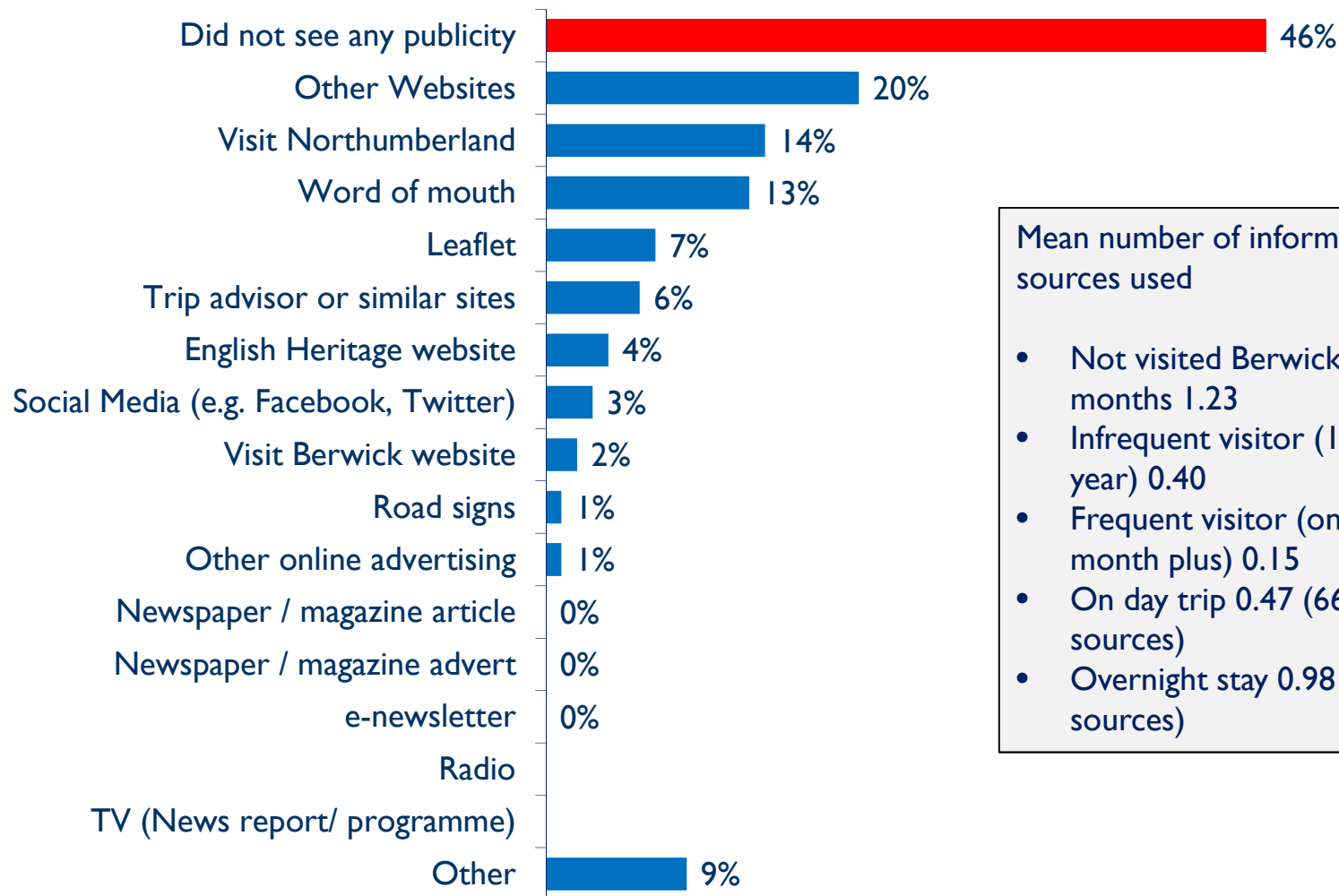
Q7. When did you start planning your trip? Base: 445





# Challenge to influence current visitors to region given their low propensity to look at information sources

## Q6. Information sources used to find out what to see & do on trip



### Mean number of information sources used

- Not visited Berwick in last 12 months 1.23
- Infrequent visitor (1-2 times a year) 0.40
- Frequent visitor (once a month plus) 0.15
- On day trip 0.47 (66% 0 sources)
- Overnight stay 0.98 (36% 0 sources)

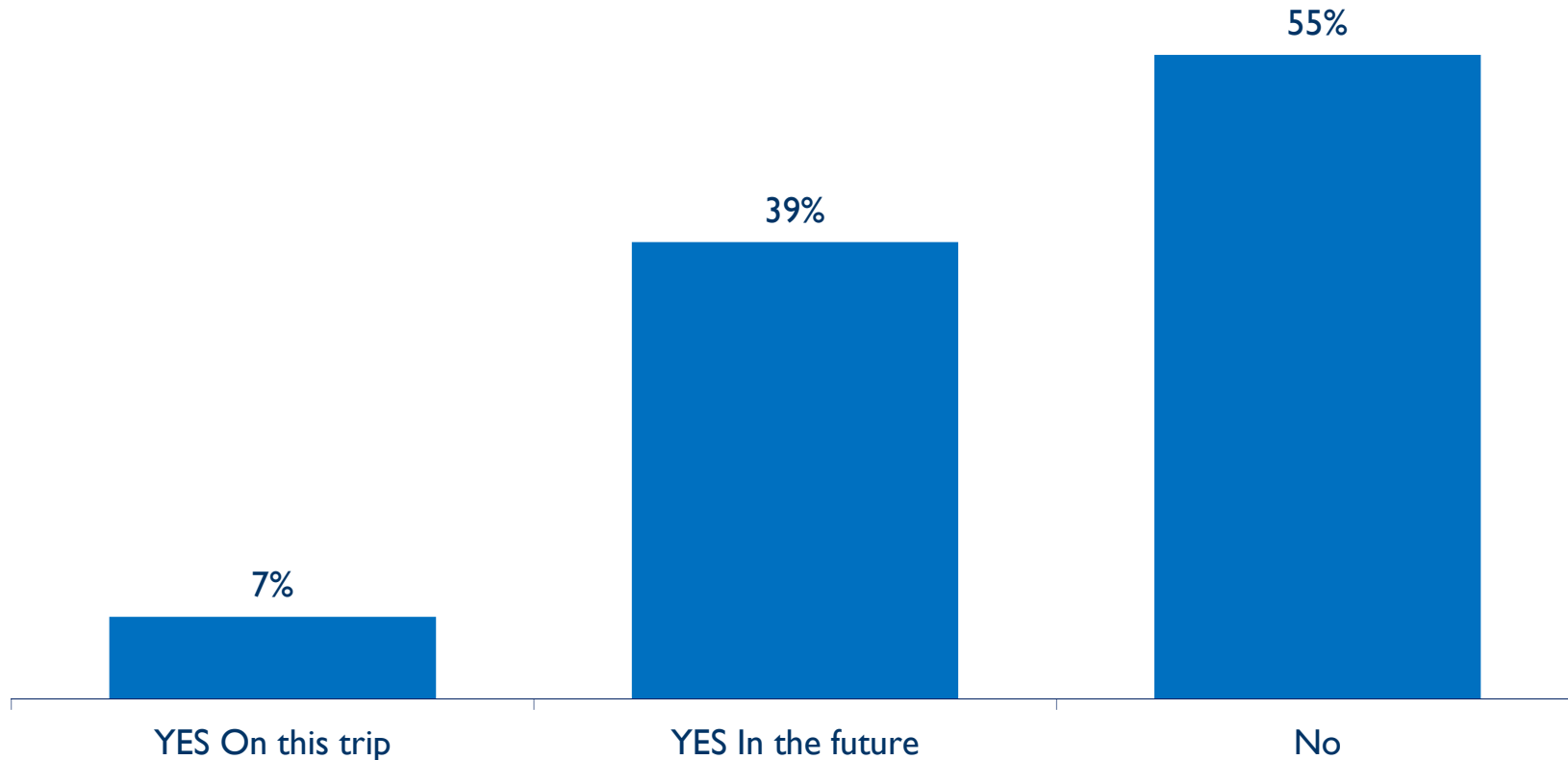
Q6. Which of the following information sources do / did you use to find out what there is to see and do on your trip? Base: 445

Reasons for not visiting  
Berwick in last 12 months



## A large proportion of visitors amongst those surveyed outside of Berwick currently would not consider visiting

### Q3. Would you consider visiting Berwick?

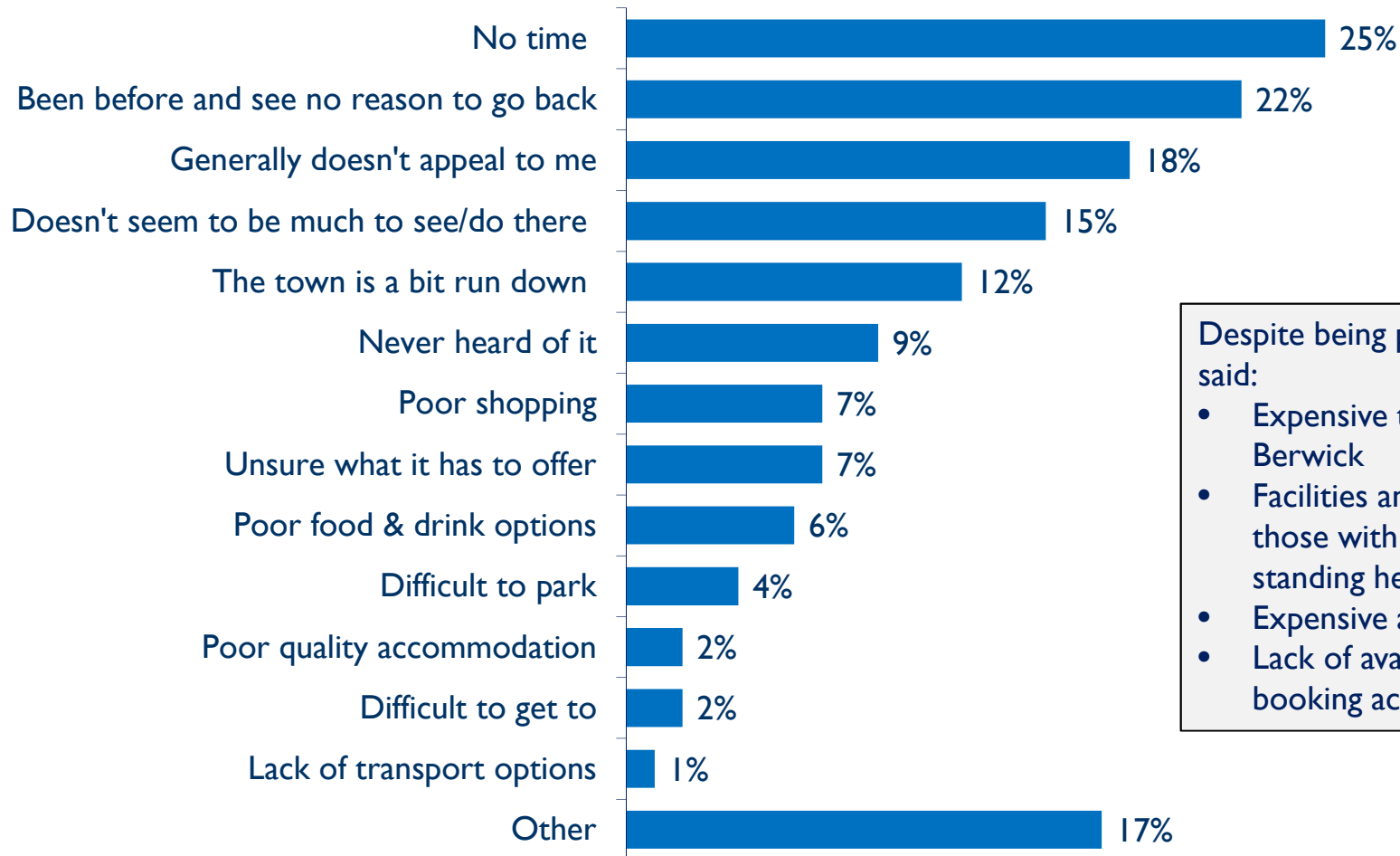


- Oddly that those on a longer break (4+ nights) are more likely to say 'no' (65%) to considering visiting Berwick than those on a short break (47%)
- No - peak period (72%) compared to peak period (44%)

Q3. Is Berwick a town you would consider visiting? Asked of all interviewed in locations outside Berwick. Base: 207

**Most non-visitors only had a single reason for not visiting (77% citing one reason, 11% 2, 12% 3+) – mean number of reasons 1.39 (out of 14)**

**Q8 Why not visited Berwick**



Despite being prompted no-one said:

- Expensive to travel around Berwick
- Facilities and amenities for those with a disability or long standing health issue
- Expensive accommodation
- Lack of availability when booking accommodation

Q8.Which of the following explains why you have not visited Berwick in the last 12 months? Prompted Base: 162 (all those not visited in last 12 months)



# Visitor experiences of Berwick





**A pool of overnight stayers located within easy reach of Berwick but 34% of these have not visited Berwick in the last 12 months nor intend to do so on this trip**

65% of all respondents saying overnight  
- 33% on a short break  
- 32% on a longer break

6.45 average nights away overnight  
- 3.26 for those on a short break  
- 9.56 for those on a longer break

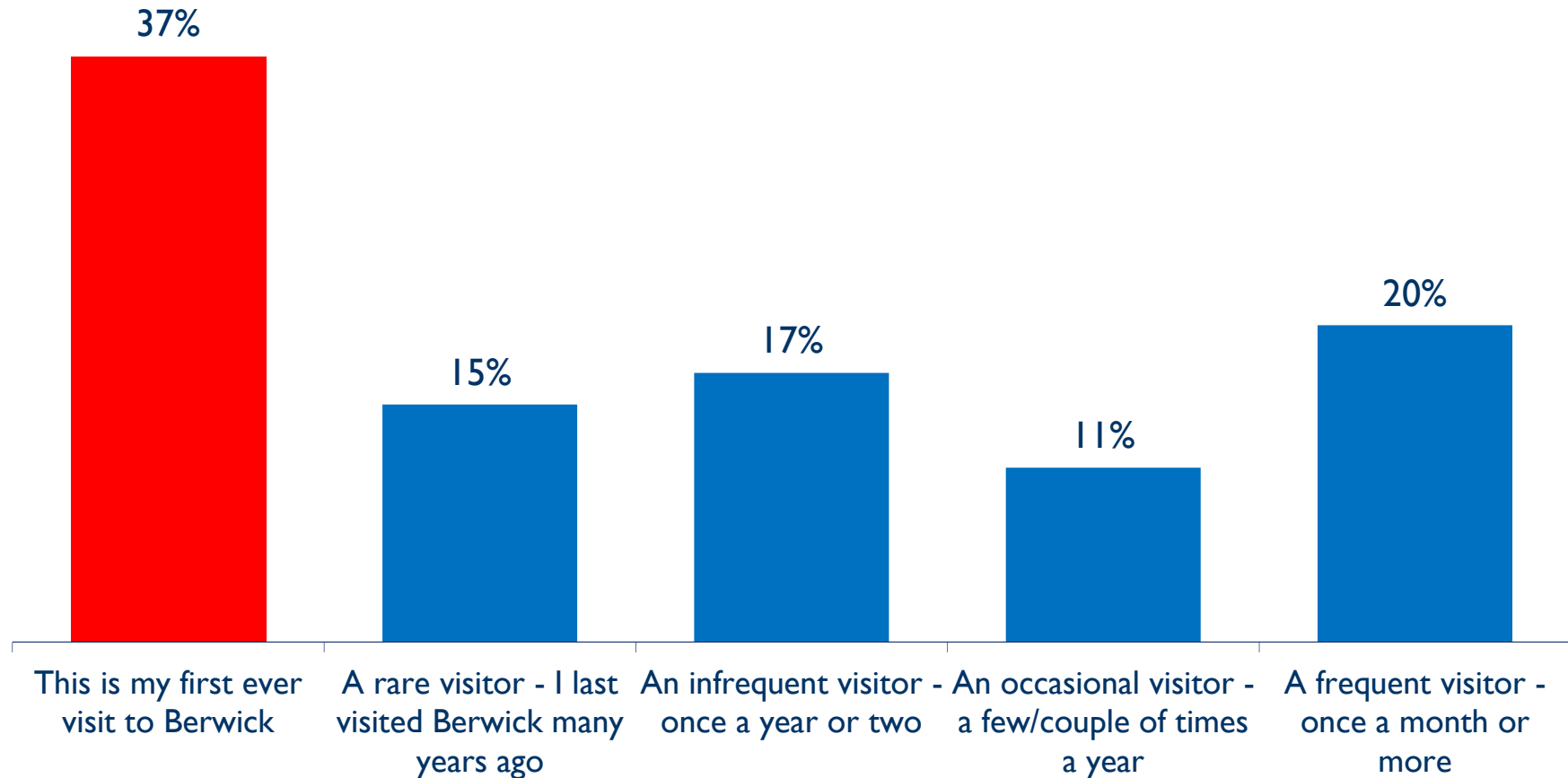
68% spending at least one night within 50 mile radius of but outside Berwick Town  
- 59% on a short break  
- 77% on a longer break

25% spending at least one night in Berwick Town  
- 34% on a short break  
- 16% on a longer break

## Berwick attracts an almost equal mix of first time, lapsed / infrequent and regular visitors

- Visitor experience questions only asked of those interviewed in Berwick

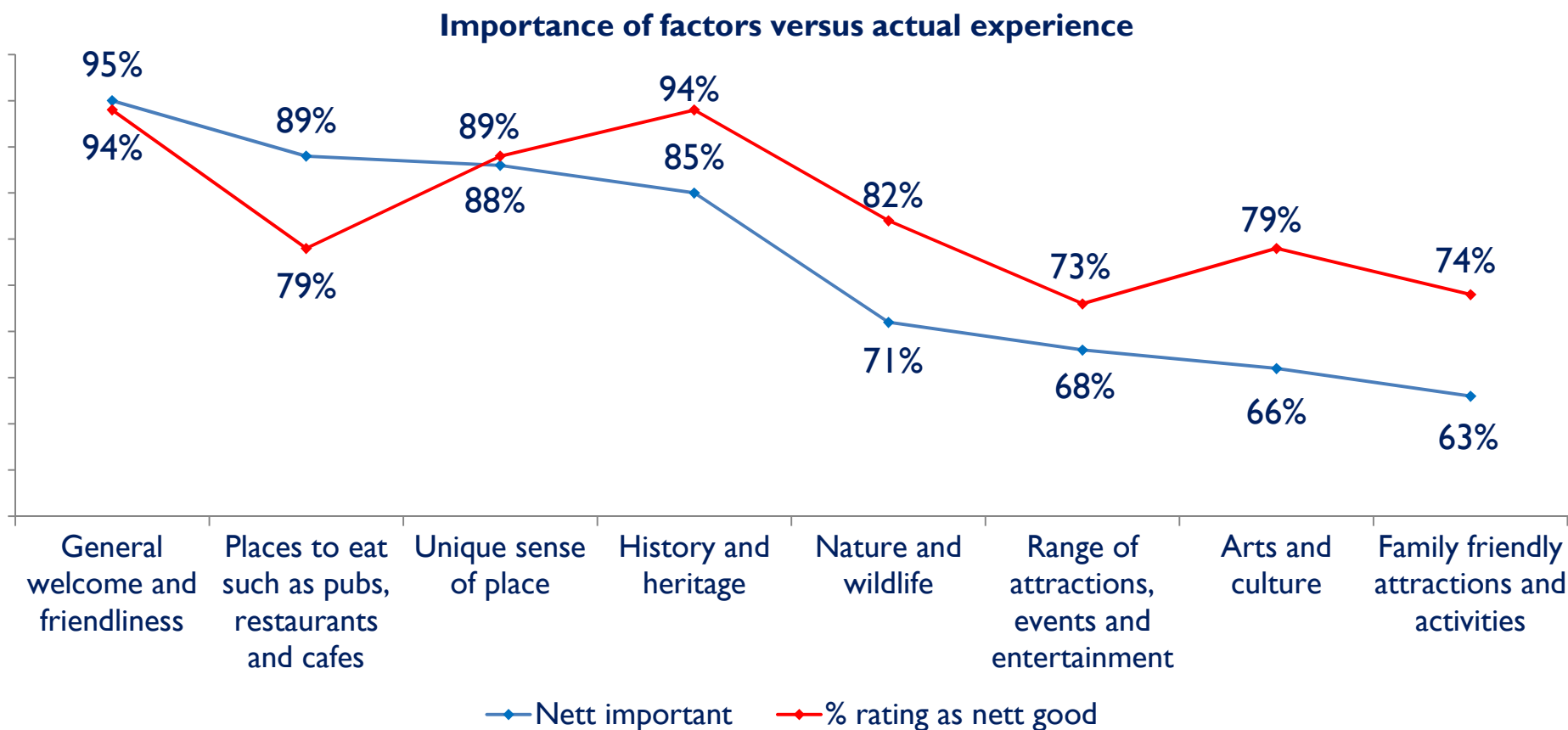
### Q4. Visitors to Berwick



Q4. Which of the following best describes your visiting of Berwick? Base: 238

## Berwick delivering well on some factors considered to be important but scope to improve in many area (see ratings on red line)

- Blue line shows % of visitors to Berwick who said factor was important. Red line shows rating for this factor amongst those who said it was important.
- 15 features rated shown across 2 slides in ranked order based on importance



Q9. On a scale of 1 to 5, with 1 being not important at all and 5 very important, how important are each of the following when visiting Berwick? (including don't know / not applicable) Base: 283

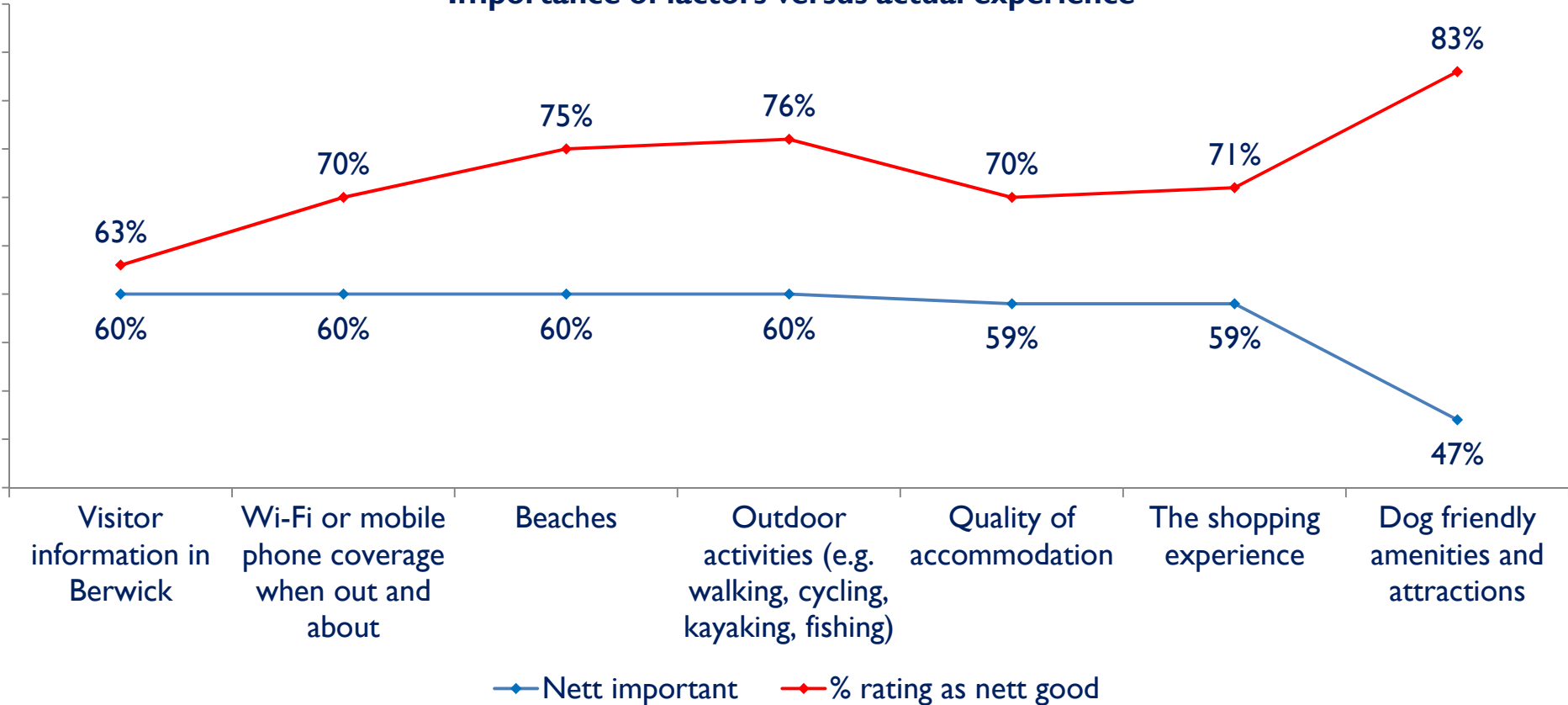
Q10. On a scale of 1 to 5, with 1 being very poor and 5 being very good, how would you rate your experiences of Berwick? Base: varies (those who rated factor as important at Q9)



**These factors are considered to be less important – although positively rated still scope to improve performance in all of them**

- Blue line shows % of visitors to Berwick who said factor was important. Red line shows rating for this factor amongst those who said it was important
- 15 features rated shown across 2 slides in ranked order based on importance

**Importance of factors versus actual experience**



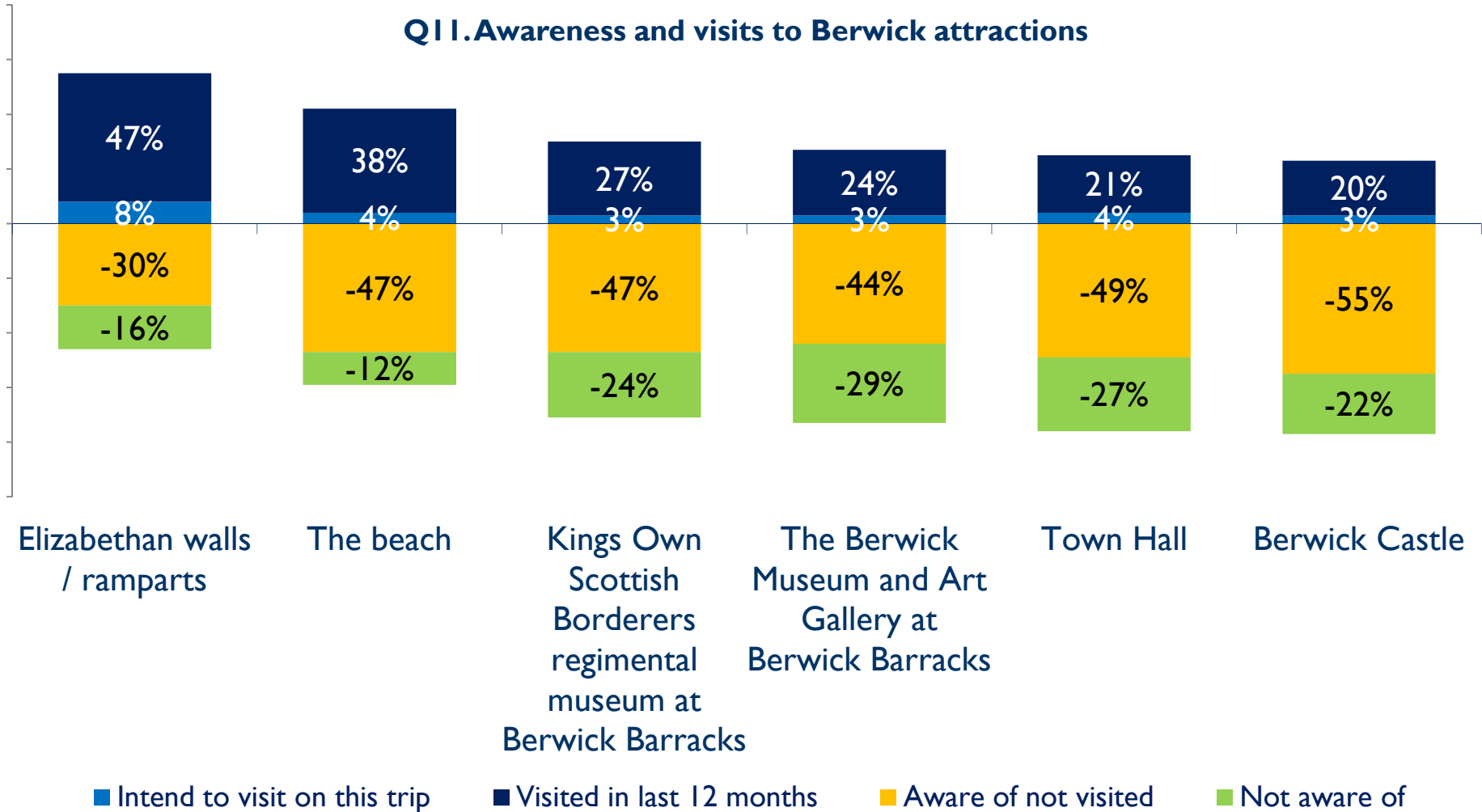
Q9. On a scale of 1 to 5, with 1 being not important at all and 5 very important, how important are each of the following when visiting Berwick? (including don't know / not applicable) Base: 283  
 Q10. On a scale of 1 to 5, with 1 being very poor and 5 being very good, how would you rate your experiences of Berwick? Base: varies (those who rated factor as important at Q9)



**Even amongst those visiting Berwick awareness of the 'offer' is an issue but more than this there is a need to convert those aware into actual visitors**

- Shown in ranked order based on if visited in last 12 months or intend to visit this trip

**Q11. Awareness and visits to Berwick attractions**



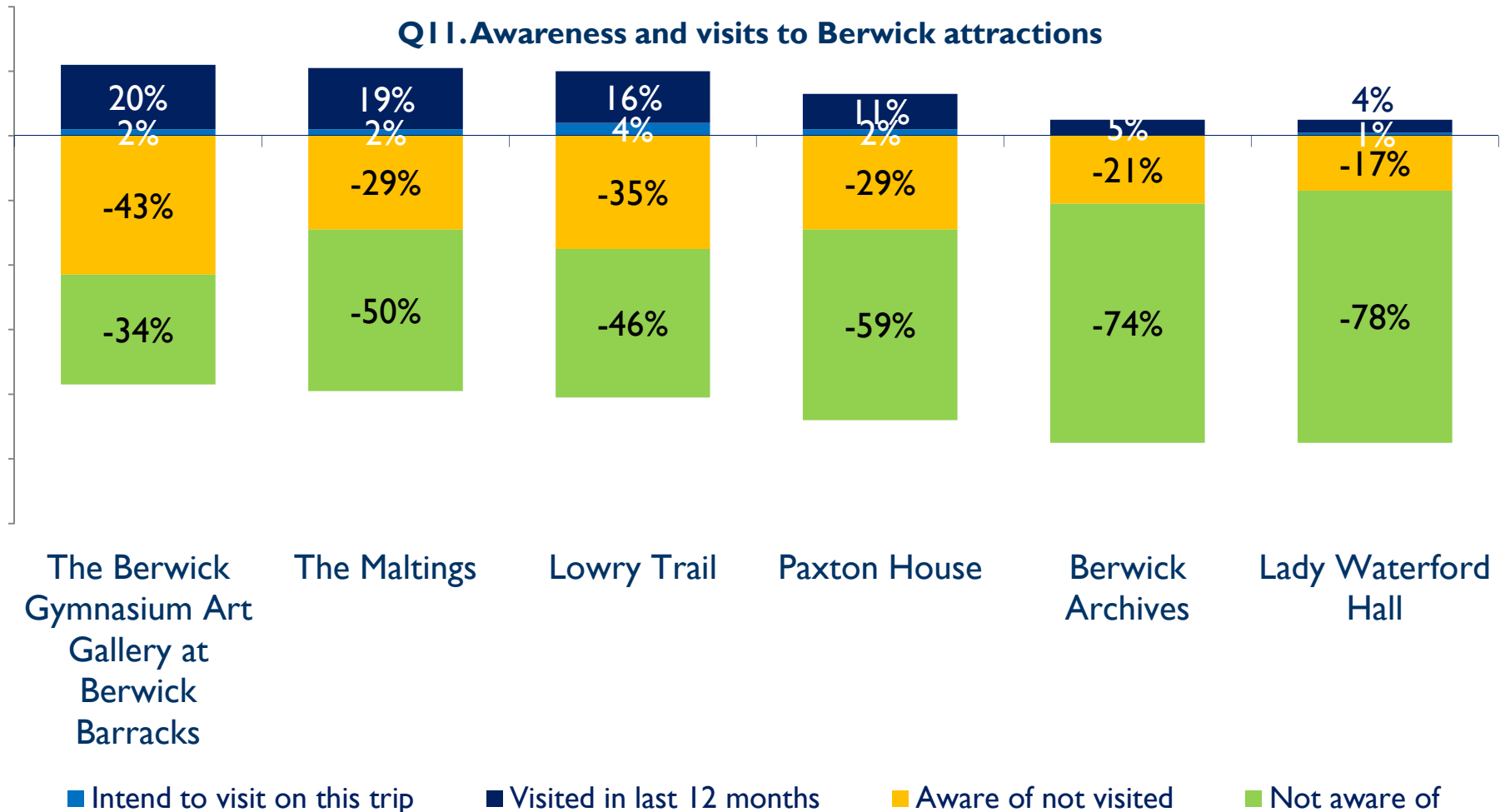
Q11. Which of the following visitor attractions in Berwick are you aware of and which have you visited in the last 12 months?  
 Base: 283 (can have visited in last 12 months and also intend to on this trip)





## Even amongst those visiting Berwick awareness of the 'offer' is an issue

- Shown in ranked order based on if visited in last 12 months or intend to visit this trip



Q11. Which of the following visitor attractions in Berwick are you aware of and which have you visited in the last 12 months?  
 Base: 283 (can have visited in last 12 months and also intend to on this trip)

## Mostly positive word associations but only historic has a majority agreement amongst current or recent visitors

- The larger and more prominent the word the greater the number of visitors selecting it from the list



### Top 10 word associations (out of 22 prompted words)

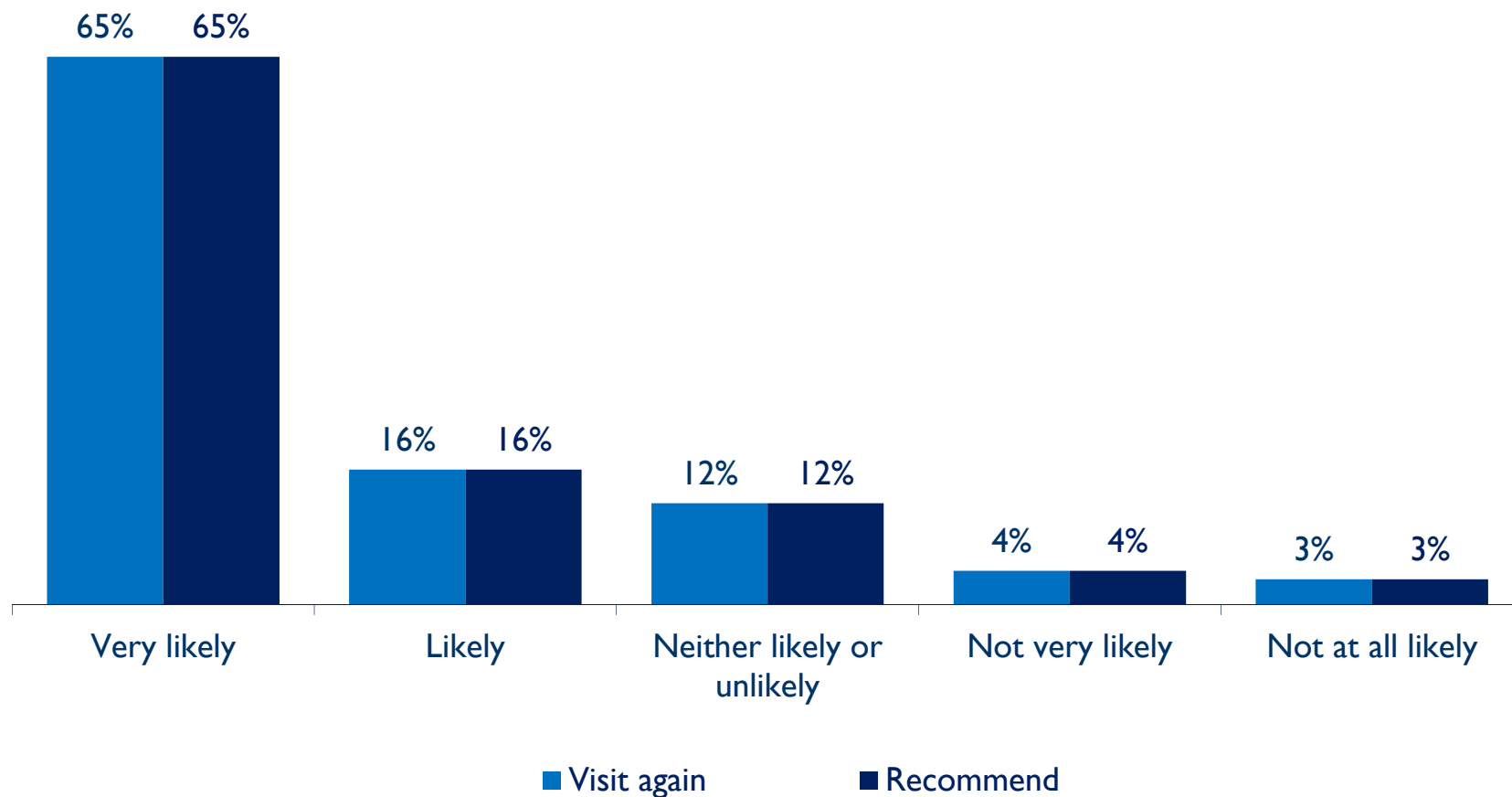
- **Historic / heritage** 74%
- **Friendly** 38%
- **Old fashioned** 35%
- **Beautiful** 33%
- **Run-down** 27%
- **Impressive** 15%
- **Family orientated** 12%
- **Value for money** 9%
- **Fascinating** 8%
- **Safe** 8%
- **Inspiring** 6%
- **Engaging** 6%
- **Uninspiring** 6%

- Run down more likely to be selected by occasional (33%) and frequent visitors (31%) rather than first timers (20%)

Q12. Please pick 3 of the following words you would strongly associate with the town of Berwick? SHOWCARD Base: 283

# High satisfaction levels amongst current visitors to Berwick but how to capitalise on this potential advocacy?

Q13. Likelihood to visit again and recommend



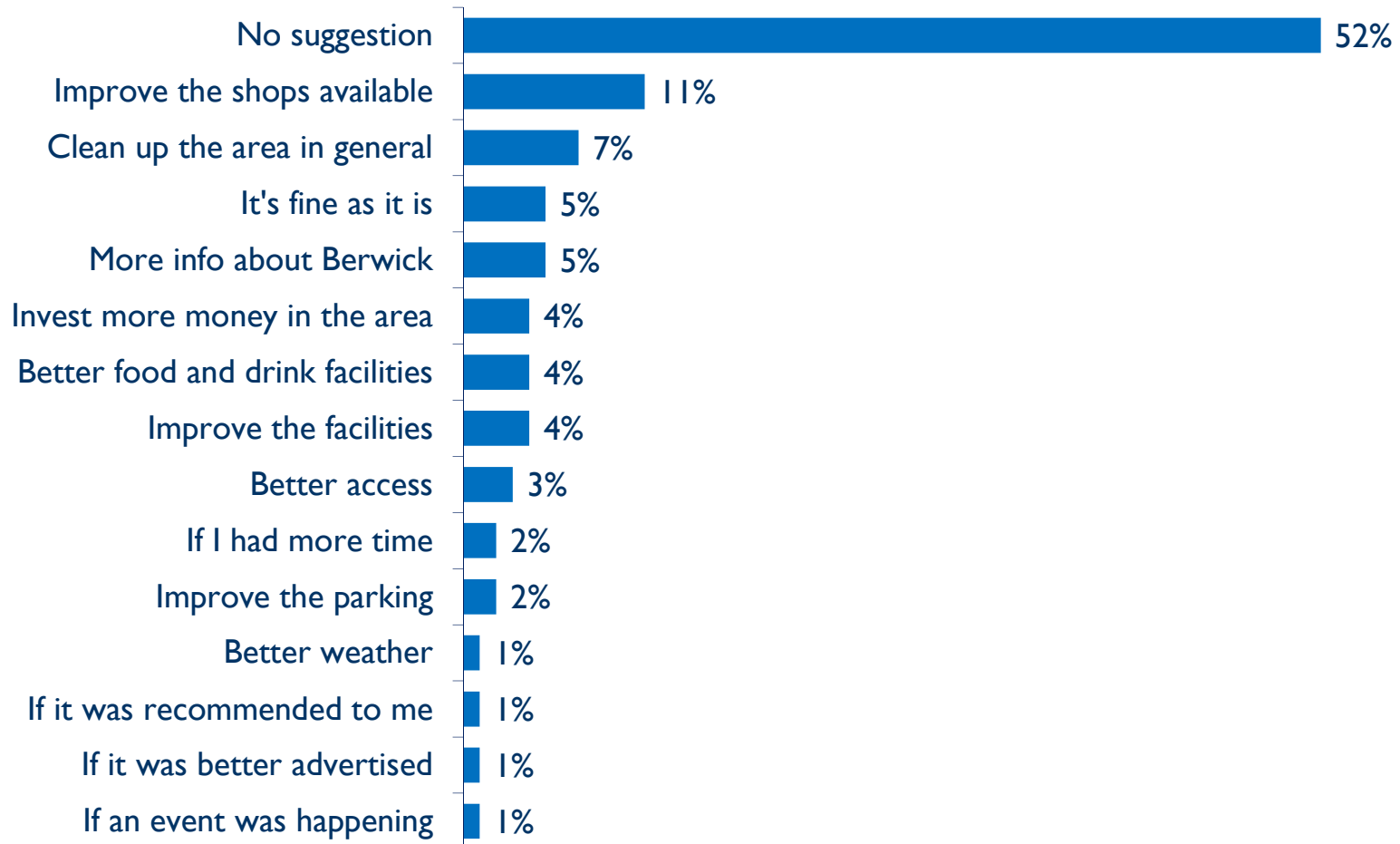
- Strangely the percentages for both questions was exactly the same

Q13. How likely are you to.... Base: 283



## Given high levels of satisfaction amongst current visitors few had suggestions how to encourage them to visit in the future

### Q14. What would encourage you to visit Berwick in the future



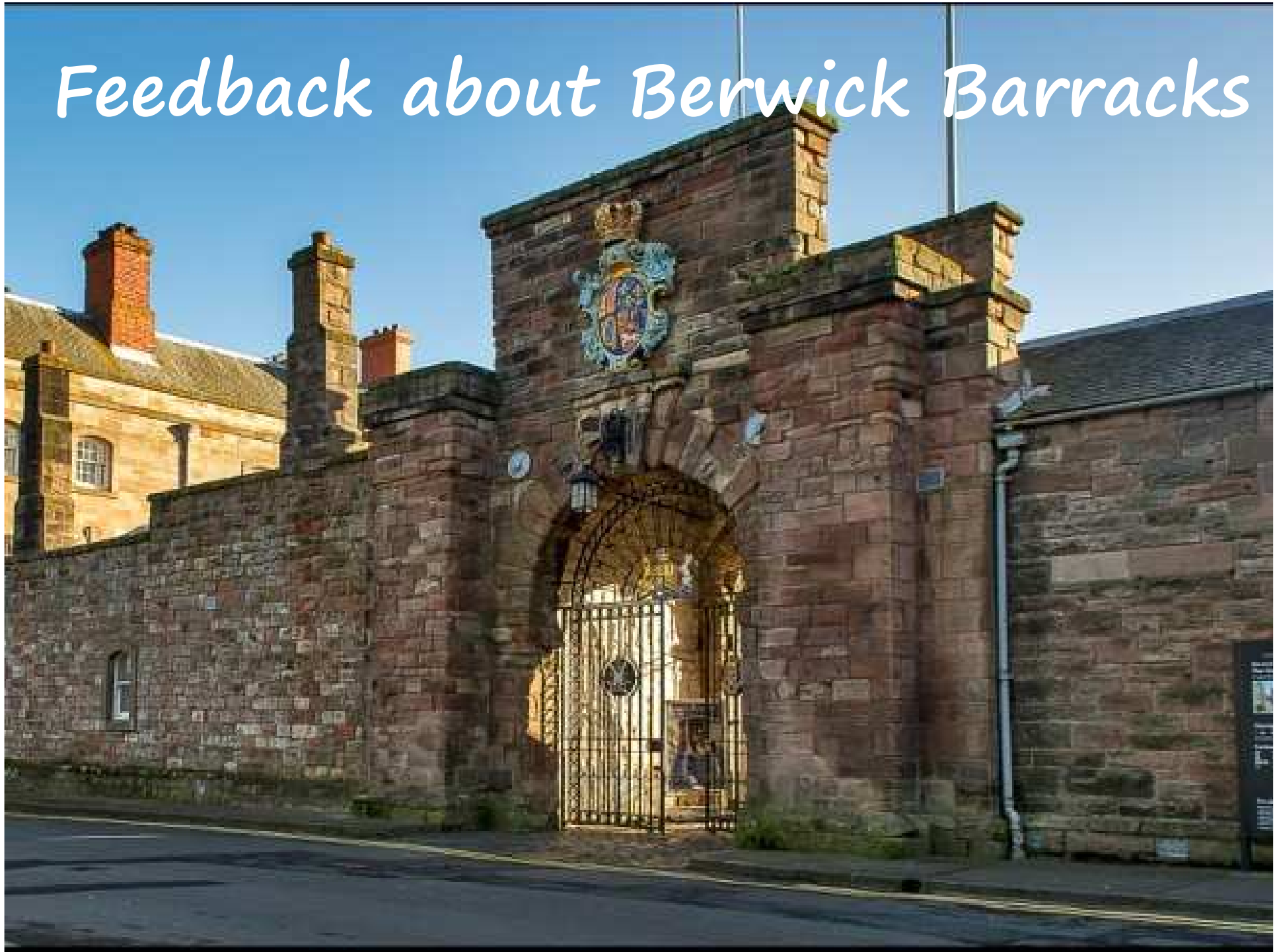
Q14. Is there anything which would encourage you to visit the Berwick in the future? Base: 445

## Top 5 suggestions by frequency of visit highlights some differences

- Green highlight shows a statistically significant difference between the percentage from this audience type giving this answer and those shaded in red

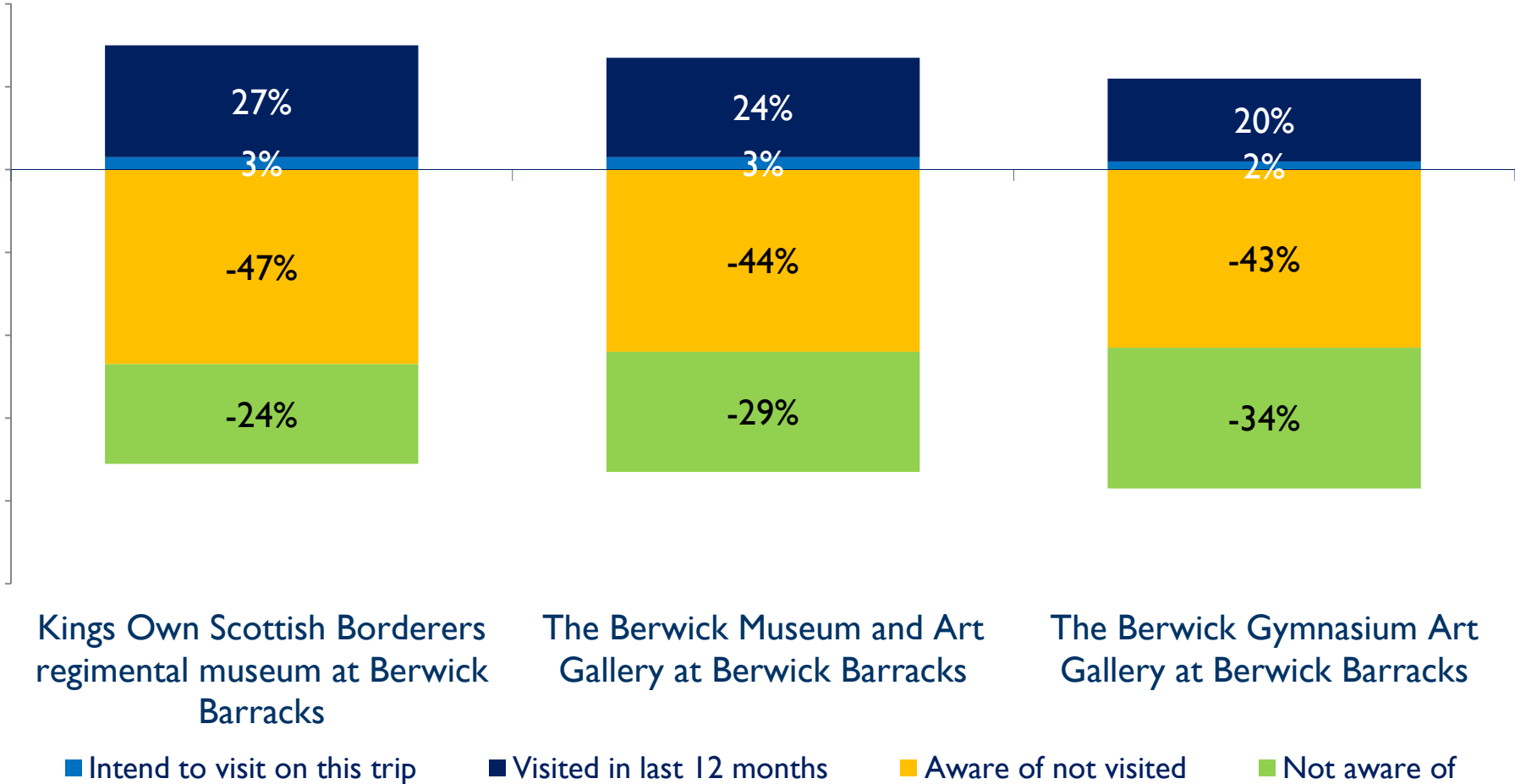
|                                | Not visited in last 12 months | Infrequent visitor (visited once) | Frequent visitor (visited 2+ times) |
|--------------------------------|-------------------------------|-----------------------------------|-------------------------------------|
| No suggestions                 | 48%                           | 52%                               | 56%                                 |
| More information about Berwick | 10%                           | 2%                                | 2%                                  |
| Clean up the area in general   | 7%                            | 7%                                | 5%                                  |
| Better access                  | 6%                            | 2%                                | 1%                                  |
| Improve facilities             | 6%                            | 2%                                | 2%                                  |
| If it was recommended to me    | 4%                            | -                                 | -                                   |
| If I had more time             | 4%                            | 1%                                | -                                   |
| Invest more in the area        | 4%                            | 2%                                | 5%                                  |
| Improve the range of shops     | 3%                            | 12%                               | 21%                                 |
| Better food and drink offer    | 3%                            | 5%                                | 3%                                  |
| It's fine as it is             | 1%                            | 8%                                | 6%                                  |

# *Feedback about Berwick Barracks*



# Amongst those visiting Berwick far fewer visiting the Barracks

Q11. Awareness and visits to Berwick attractions



Q11. Which of the following visitor attractions in Berwick are you aware of and which have you visited in the last 12 months?  
 Base: 283 (can have visited in last 12 months and also intend to on this trip)



## A few differences emerge by different audience types

- Percentage of different audience types who have or intend to visit each site shown in the table
- Out of those visiting or intending to visit Berwick Barracks 67% visited all three attractions, 13% two and 20% one

|                                     | Kings Own Scottish Borderers Museum | The Berwick Museum & Art Gallery | The Berwick Gymnasium Art Gallery |
|-------------------------------------|-------------------------------------|----------------------------------|-----------------------------------|
| Day tripper                         | 30%                                 | 24%                              | 19%                               |
| Overnight stayer                    | 29%                                 | 29%                              | 24%                               |
| First time visitors to Berwick      | 36%                                 | 34%                              | 28%                               |
| Frequent visitors (2+ times a year) | 32%                                 | 28%                              | 23%                               |
| EH Member                           | 55%                                 | 55%                              | 38%                               |
| Non EH Member                       | 25%                                 | 22%                              | 20%                               |
| Visiting with children              | 22%                                 | 19%                              | 18%                               |
| Visiting without children           | 22%                                 | 23%                              | 19%                               |

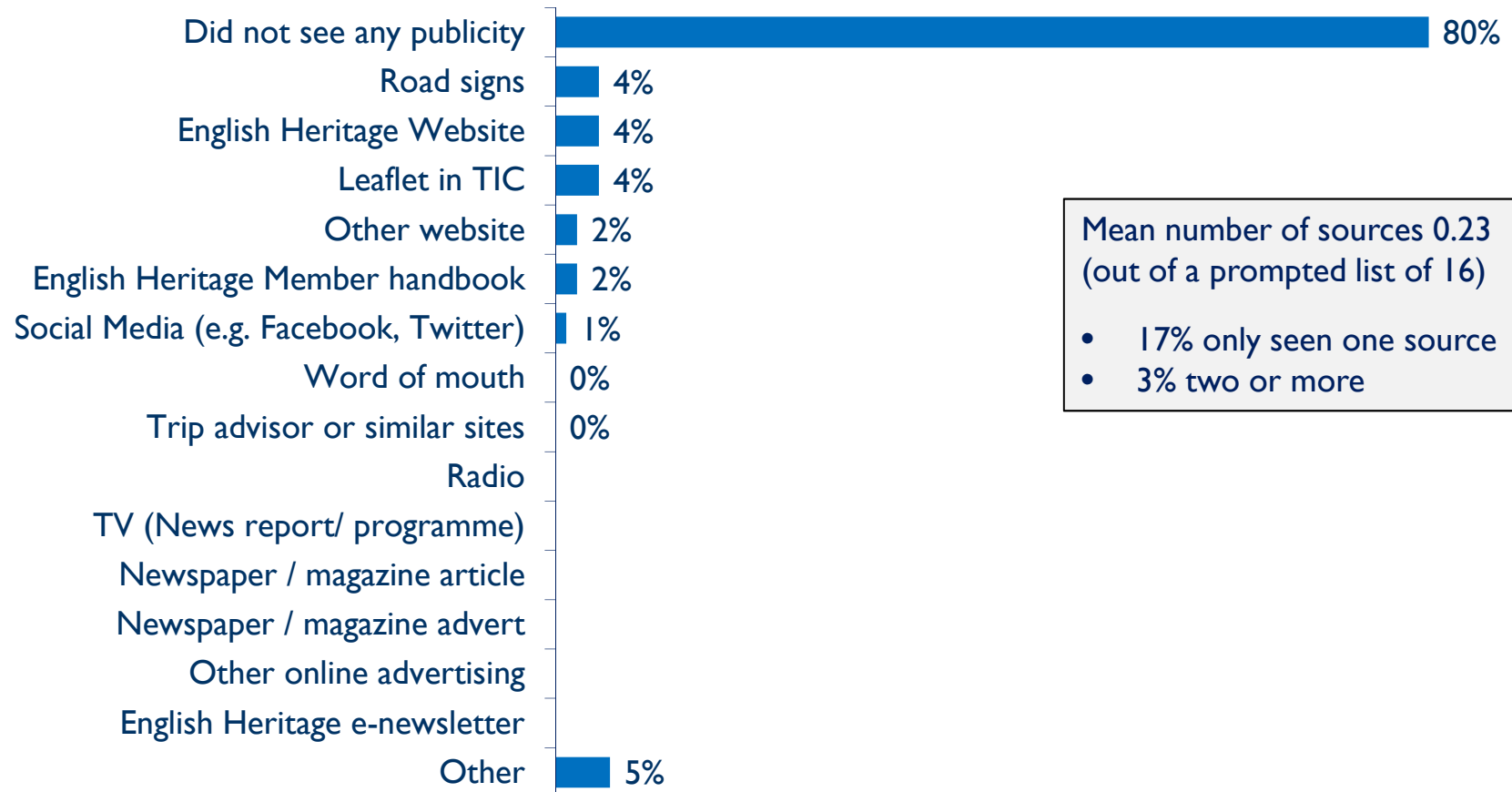
Q11. Which of the following visitor attractions in Berwick are you aware of and which have you visited in the last 12 months?  
Base: 283 (all visited Berwick in last 12 months)



## Awareness of any publicity or promotion of the Barracks is extremely low, amongst those who have visited the town

- Asked to all aware of Berwick Barracks / visited Berwick barracks in last 12 months

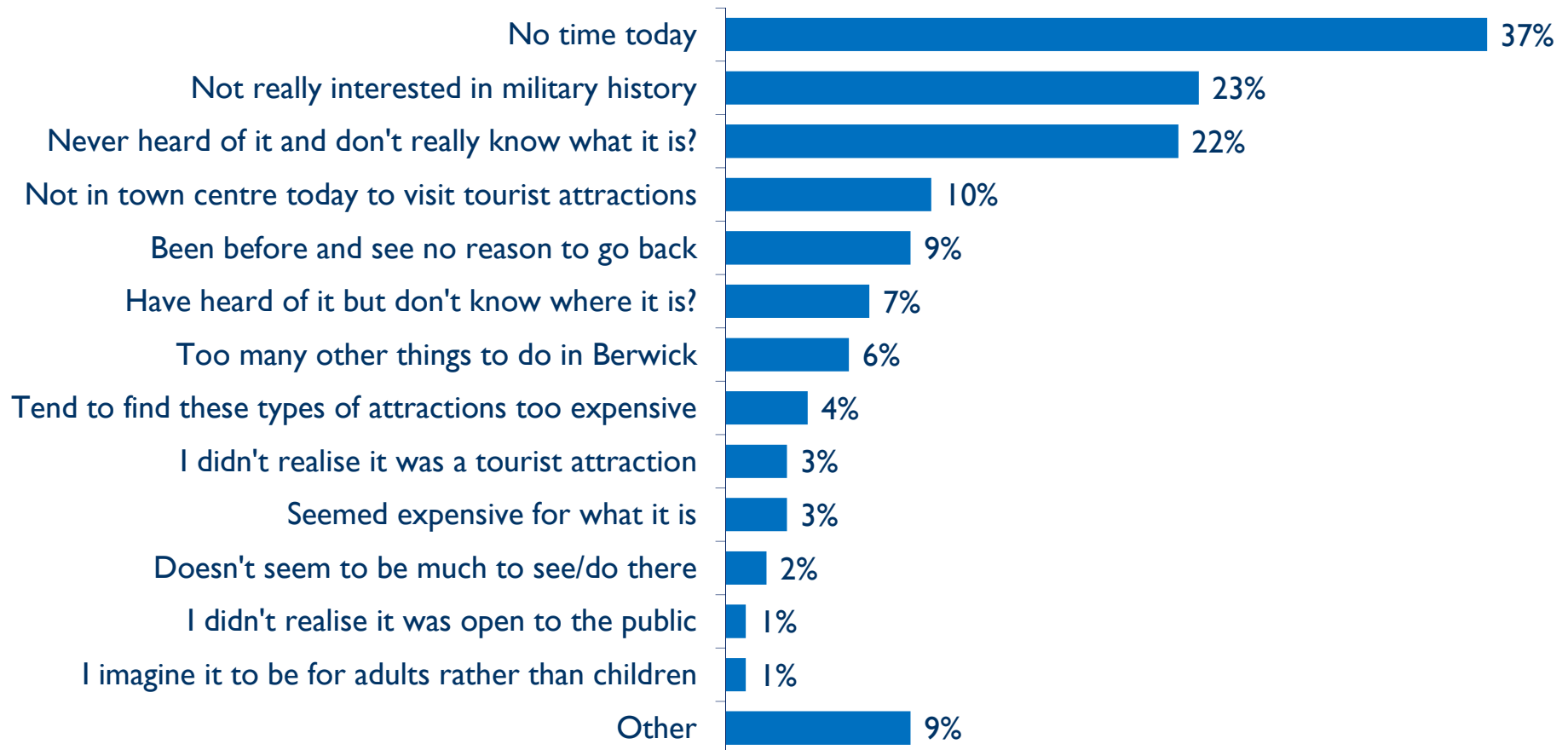
### Q17. Where seen publicity for the Barracks



## Raising awareness and getting it on to non-visitors consideration lists is required ... how can it become a must-see site when visiting the town?

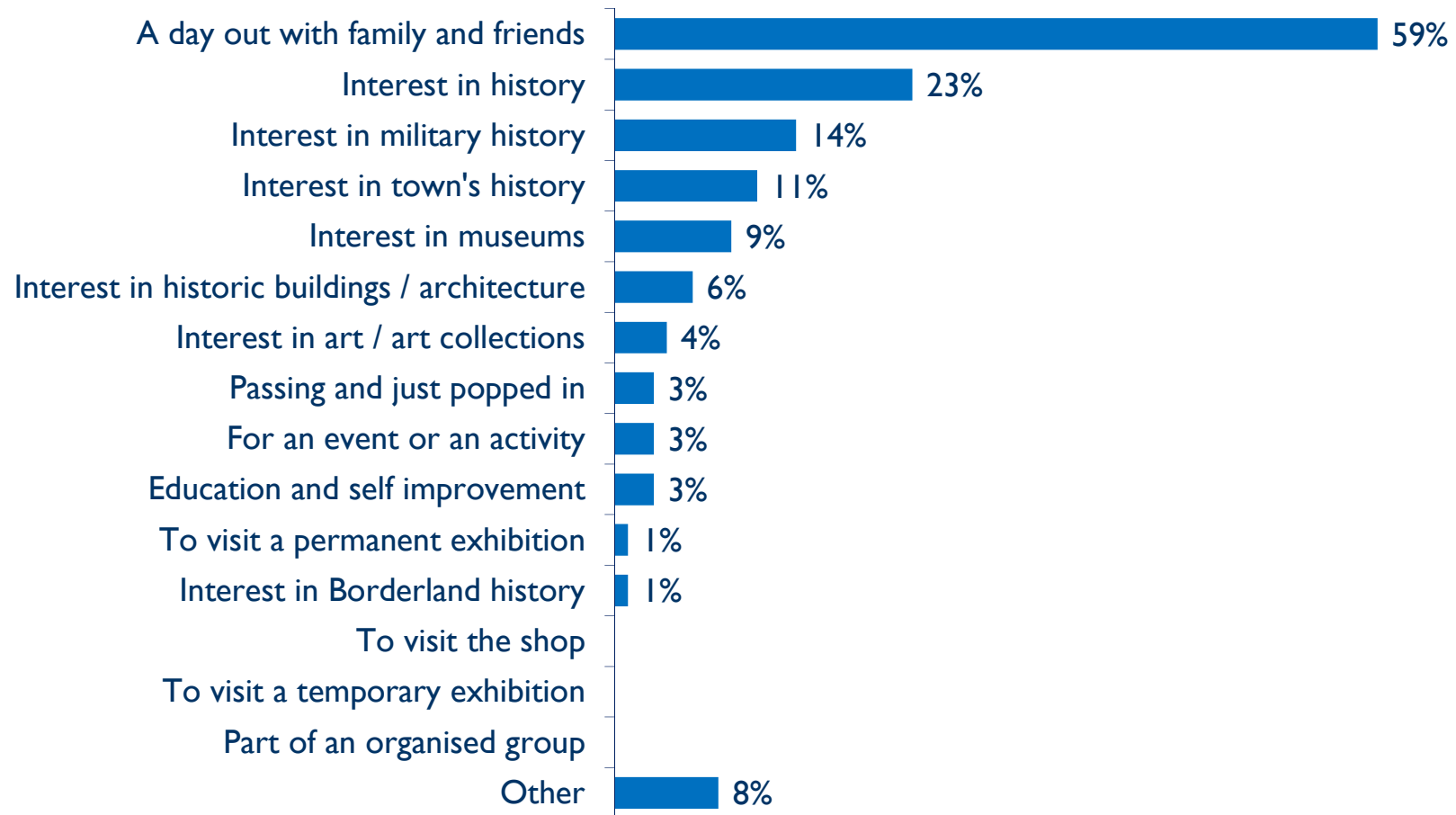
- Asked to those who have visited Berwick in last 12 months but have not visited any of the Barrack sites

### Q15. Why not visited Barracks?



## Amongst visitors there are both general and specific reasons for visiting

### Q16. Why visit the Barracks?



Q16. What were your reasons for visiting Berwick Barracks on your last visit/this visit? Prompted Base: 80 (all those not visited in last 12 months)

**Greater resonance with positive word associations than for Berwick itself but also 'old fashioned' and few selecting 'impressive' or 'fascinating' or 'inspiring'**

- The larger and more prominent the word the greater the number of visitors selecting it from the list

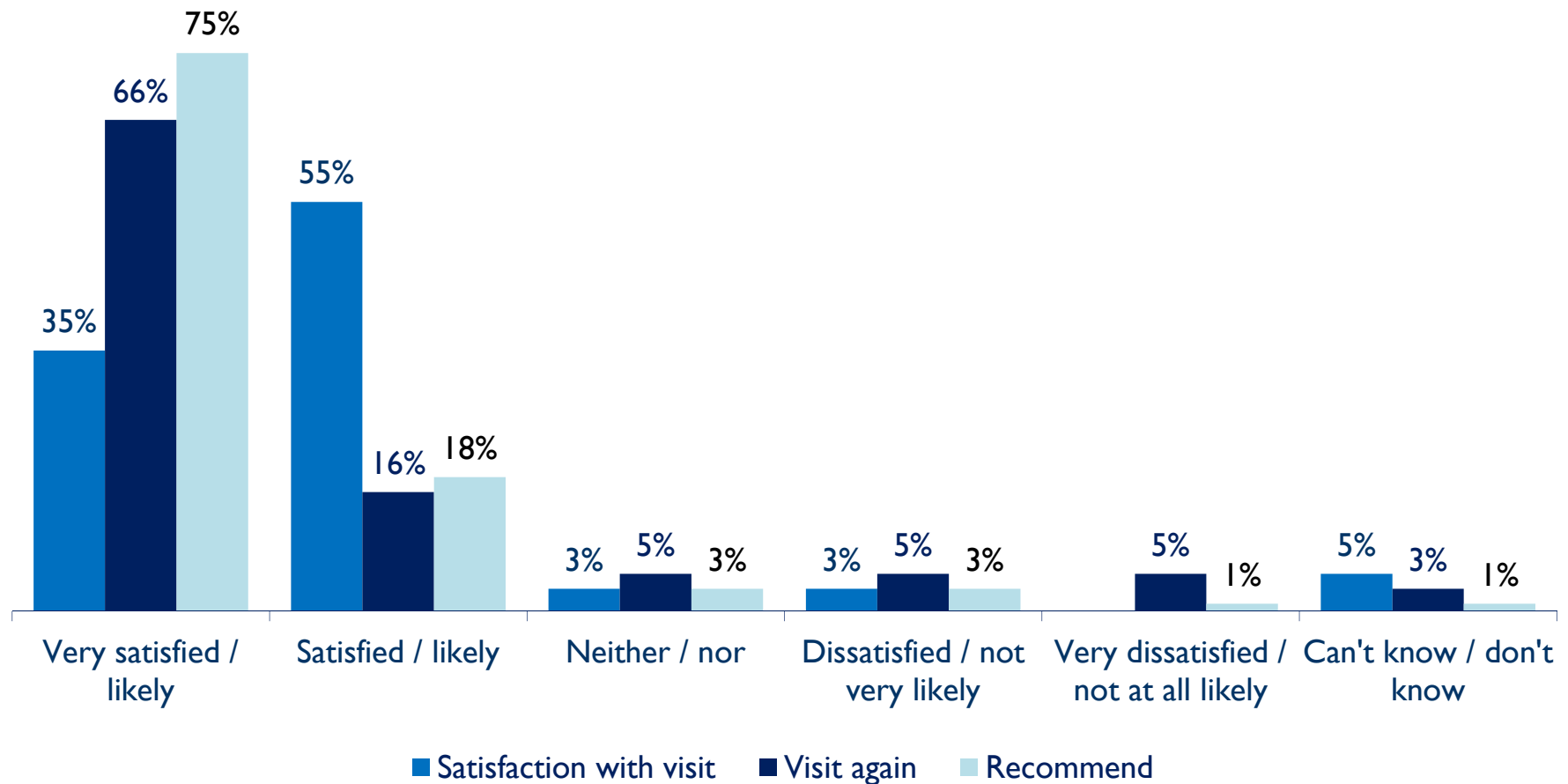


| Top 10 word associations<br>(out of 22 prompted words) |     |
|--|-----|
| • Historic / heritage                                  | 89% |
| • Old fashioned  | 59% |
| • Family orientated                                    | 32% |
| • Impressive   | 23% |
| • Fascinating  | 21% |
| • Beautiful  | 12% |
| • Friendly   | 12% |
| • Quality  | 10% |
| • Inspiring  | 9%  |
| • Safe   | 6%  |
| • Value for money                                      | 5%  |
| • Engaging   | 5%  |

Q20. Please pick 3 of the following words you would strongly associate with Berwick Barracks? SHOWCARD Base: 218 (all visited Berwick in last 12 months)

## Satisfaction levels with the 'product' and advocacy high amongst current visitors

Q18 & Q21. Satisfaction with visit and likelihood to visit again and recommend

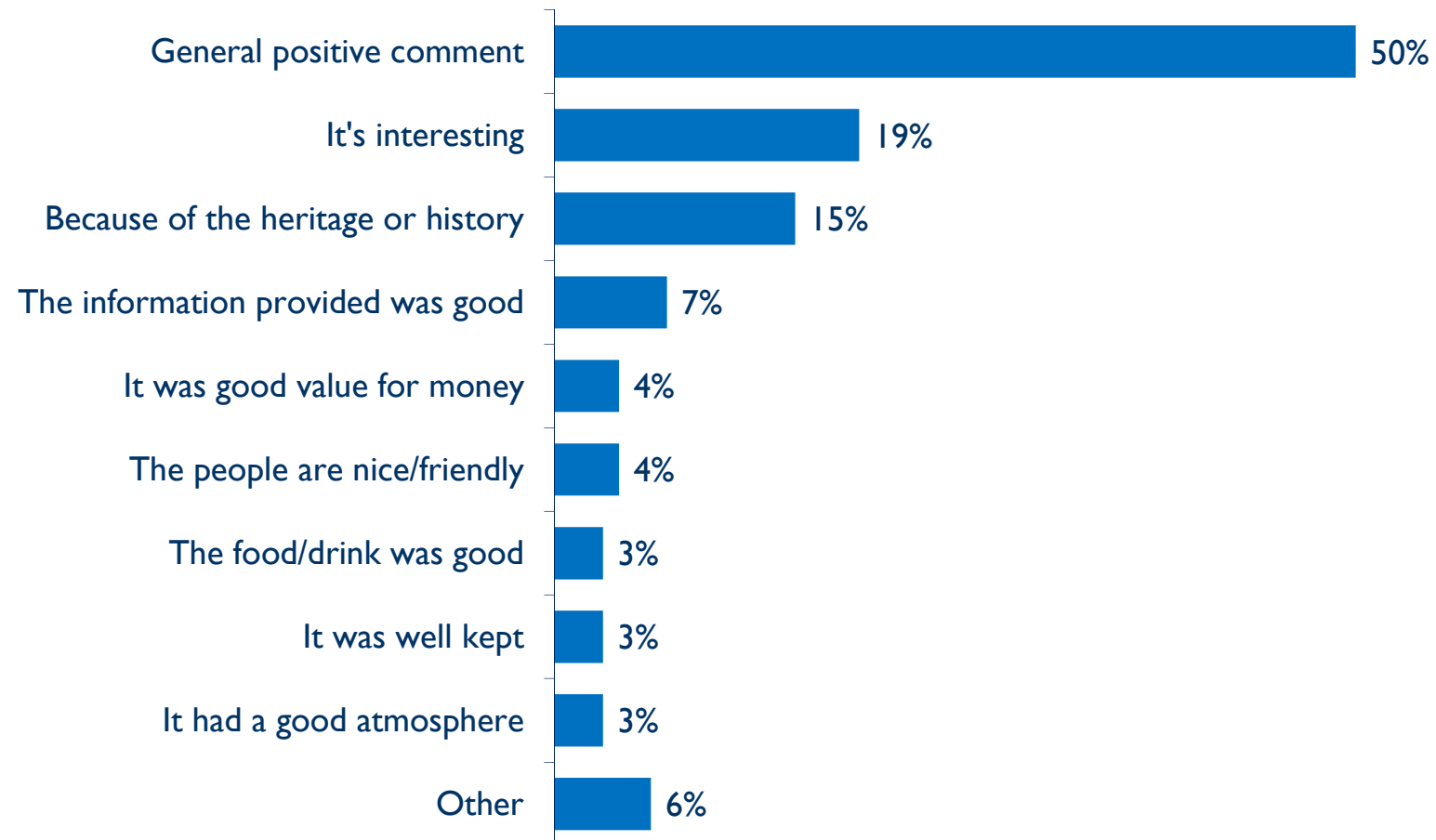


Q18. Overall, how satisfied were you with your last visit / this visit to Berwick Barracks? Base: 80

Q21. How likely are you to.... Base: 80

## Reasons for being satisfied with visit are quite general and non-specific

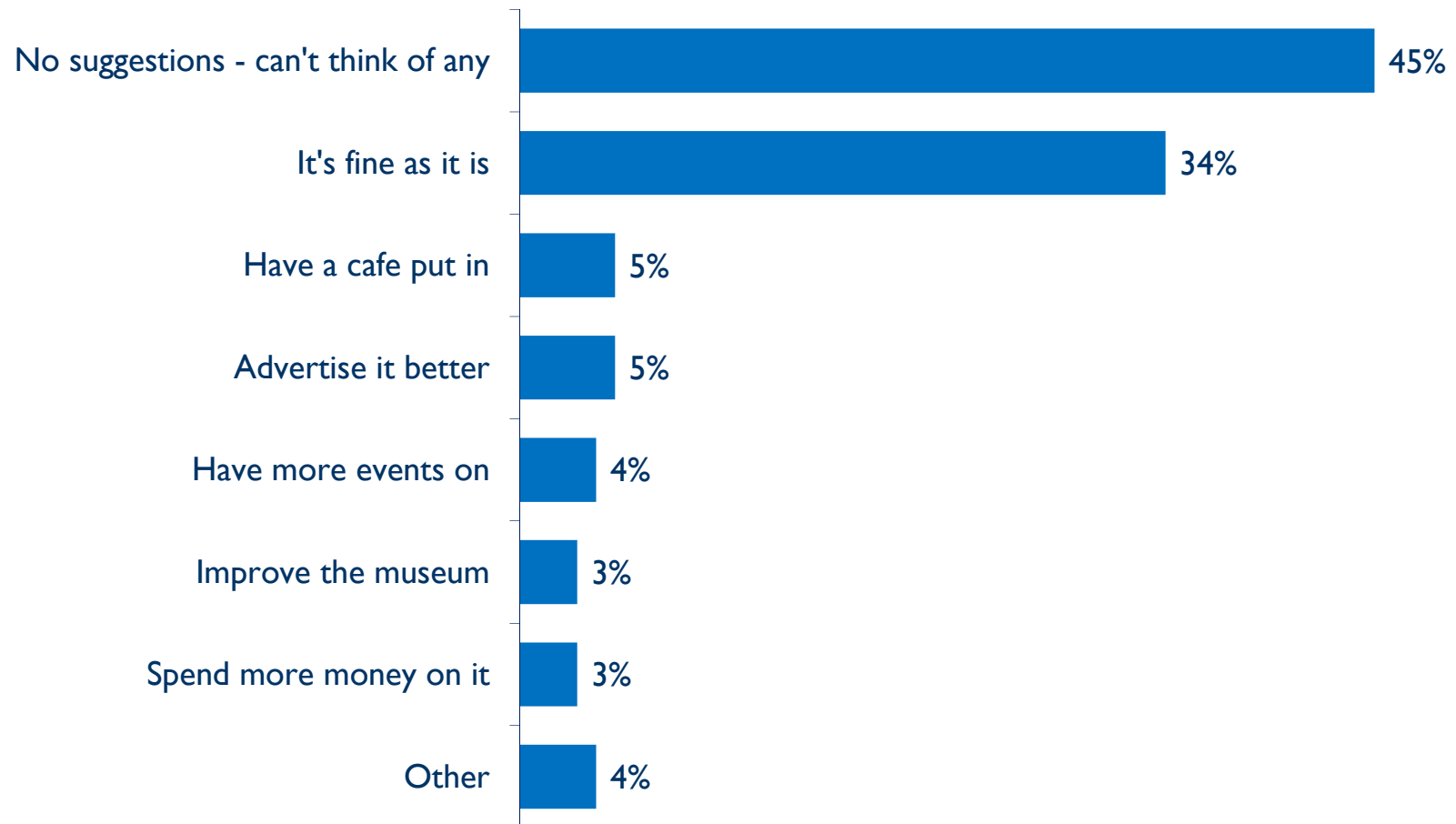
### Q18b. Why satisfied with visit to the Barracks



Q18b. Why do you say this? Verbatim answers Base: 72 (all those very or satisfied with last visit / this visit to Berwick Barracks)

## Reflecting high satisfaction levels, visitors to Barracks have few suggestions to improve the experience for visitors

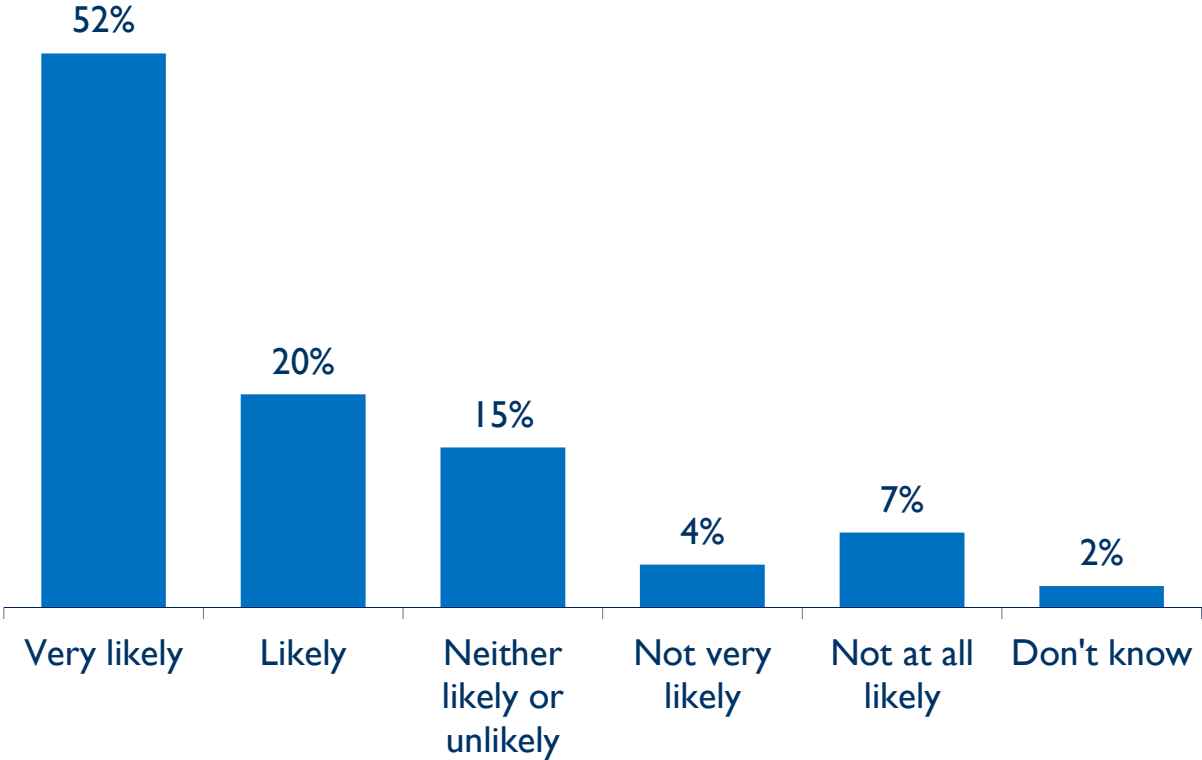
### Q19. Suggestions to improve the experience of visitors to the Barracks



Q19. What one thing could English Heritage do to improve the experience for visitors to Berwick Barracks? Base: 80

# The Barracks needs more than just free admission to attract more visitors

Q21. Likelihood to visit if Berwick Barracks was free



| Very likely                                  |     |
|--|-----|
| Day tripper                                  | 57% |
| Overnight stayer                             | 50% |
| First time visitors to Berwick               | 58% |
| Infrequent visitors to Berwick (once a year) | 49% |
| Frequent visitors to Berwick (2+ per year)   | 57% |
| EH Member                                    | 46% |
| Non EH Member                                | 54% |
| Visiting with children                       | 59% |
| Visiting without children                    | 29% |

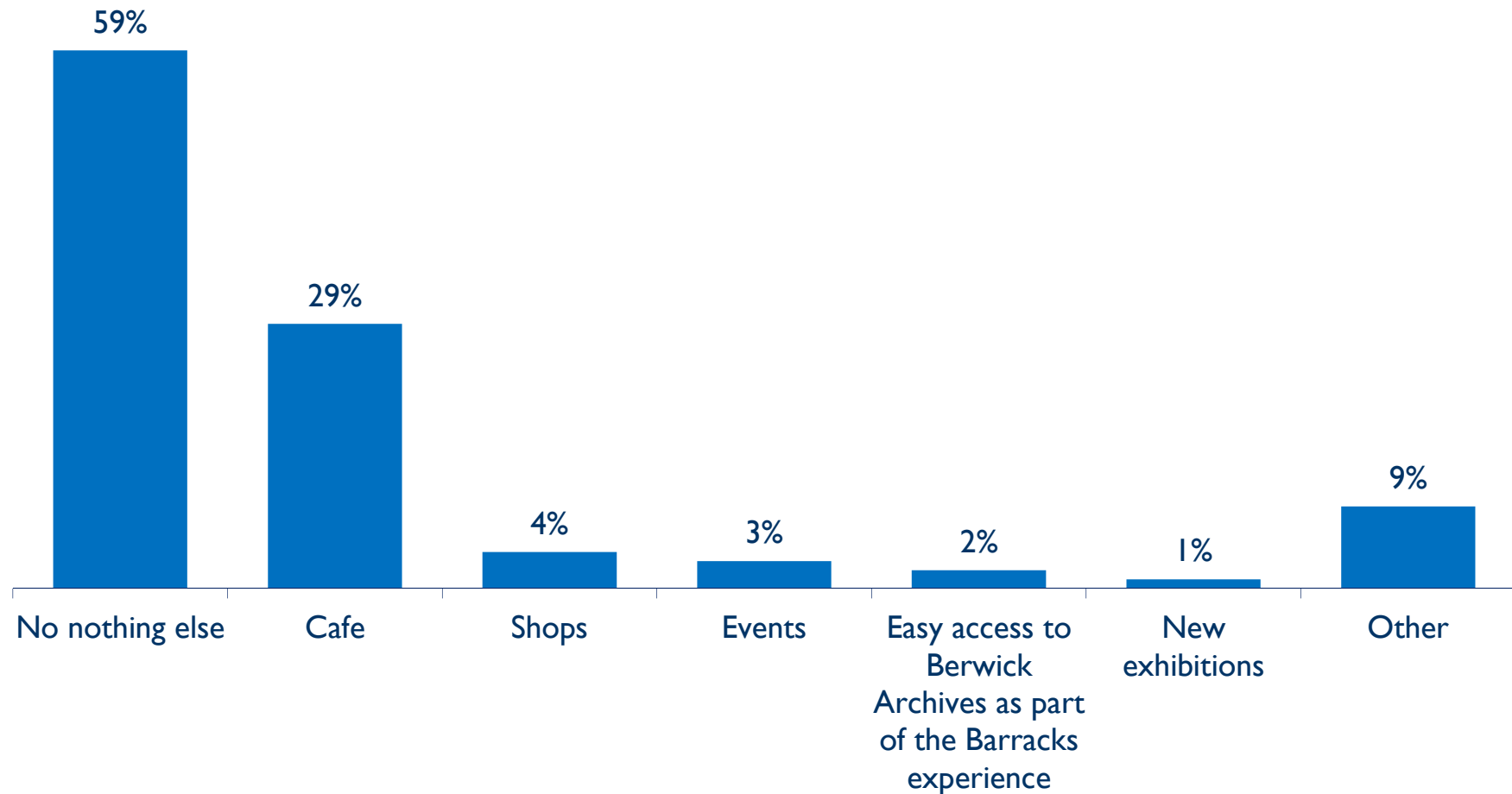
Q21. How likely are you to... -Visit Berwick Barracks if it was free to enter in the future? Base: 218 (all visitors to Berwick Barracks in last 12 months and those aware of the Barracks)





## Ideas tested had little resonance amongst current visitors to Berwick

Q22. What would encourage you to visit Berwick Barracks in the future



Q22. Is there anything which would encourage you to visit the Berwick Barracks in the future? Base: 283 Prompted list (all who have been to Berwick in last 12 months)

# Conclusions



## Profile of visitors

- The region attracts a broadly equal mix of day trippers, those on a short break and those on a longer holiday.
- The majority of visitors to the region are older adults who are in the post-family lifestage, visiting with their partner or spouse and without any children in their party.
- The region attracts a higher proportion of visitors from higher social grades, this along with the high proportion of visitors who are from a post-family lifestage suggests many visitors are likely to have a reasonably high level of disposable income.
- Although Berwick attracts a loyal cohort of regular repeat visitors, there is still a sizeable proportion of day trippers and overnight stayers in the region who have not visited in the last 12 months.
- With just over half saying they would not consider visiting Berwick there is a large pool of potential visitors to target and change their perceptions, intentions and encourage them to visit the town whilst holidaying in the area or returning on a subsequent day trip.

## Marketing the offer

- Having a high profile on general visitor websites is likely to have the greatest influence in terms of different marketing channels to use.
- With high levels of satisfaction amongst actual visitors to the town and their claimed likelihood to recommend Berwick, proactive ways to help facilitate this to get them to promote the town to others should be explored.
- There are many attractions in the town that those visiting in the last 12 months have not heard of or are not aware of. Increasing awareness amongst existing visitors may in itself increase visitor numbers.
- Most non-visitors only cited a single barrier for not visiting, although they gave a variety of different reasons.
- Changing perceptions of the town and how much there is to see and do should help address the top five barriers given for not currently visiting.

## Improving the visitor experience

- Based on their satisfaction ratings, likelihood to return, recommend and word associations, the majority of visitors are very positive about the town.
- However, the percentages associating the town with different positive words (when prompted) suggests there is scope to improve the 'offer' and clearly stand out, resonating more strongly with certain key word associations, depending on what you want to be known for.
- Against the factors current visitors to the town deem important Berwick is doing well (i.e. rated good or very good by 90% or more of visitors who listed the factor as being important to them) for 'general welcome and friendliness', history and heritage' and having 'a unique sense of place'. These aspects which are currently being demonstrated and lived should be used in marketing the town.
- The areas being rated as being good or very good by less than 75% of those who listed them as being important, which suggests a need to improve the experiences of these, were 'range of attractions, events and entertainments', 'family friendly activities', visitor information in Berwick', wifi or mobile phone coverage when out and about', 'quality of accommodation' and 'the shopping experience.

## Attracting more visitors to the Barracks

- The Barracks themselves are currently attracting just under a third of visitors to the town.
- It would appear that any current marketing activities are having a low level of penetration even amongst those aware of the Barracks.
- To attract more visitors a visit needs to be seen as better value for time, perceived as being more than just a military museum, with the site supported by more (effective) marketing.
- Those visiting the Barracks are generally positive about the experience, with high ratings for satisfaction with their visit, likelihood to recommend and visit again. However, the word associations suggest there is considerable scope to improve the experience to resonate more strongly with some of these positive words.
- Making the Barracks free to enter may increase visits slightly but more is needed to attract greater numbers, although those who visit Berwick already are generally unsure what it is that would get them to visit.



This research has been carried out in compliance with  
ISO 20252, (the International Standard for Market and Social research),  
The Market Research Society's Code of Conduct and UK Data Protection law.



## Contact ...

*Nick How*

[nick.how@qaresearch.co.uk](mailto:nick.how@qaresearch.co.uk)

[www.qaresearch.co.uk](http://www.qaresearch.co.uk)

**Qa Research, Mill House, North Street, York ,YO1 6JD**  
**Tel: 01904 632039**

Qa Research is a trading name of QA Research Ltd, UK registered, company registration  
number 3186539, address in York as above.

