



Windermere TIC Survey – November 2009

1. INTRODUCTION

South Lakeland District Council (SLDC) has recently taken the decision to reduce its funding support for the Tourist Information Centres (TICs). Windermere TIC is one of those under treat of closure. To better understand the local business community’s perceptions of the Windermere TIC and to what extent they rely on it for tourism business Cumbria Tourism has carried out a survey amongst businesses in the Windermere and Bowness area. The survey aimed to:

- Identify the importance of the TIC to the local and wider tourism economy
- Explore the future vision of the TIC including its location, product and service offerings, and the way it is funded and supported

Methodology

Between 30th October and 12th November 98 businesses from the Windermere and Bowness area completed the online Windermere TIC survey. In total 370 businesses were emailed the survey invitation, which means a response rate of 27% was achieved. The sample was sourced from Cumbria Tourism’s Destination Management System, which holds information on the county’s tourism businesses including accommodation providers, visitor attractions and retail providers.

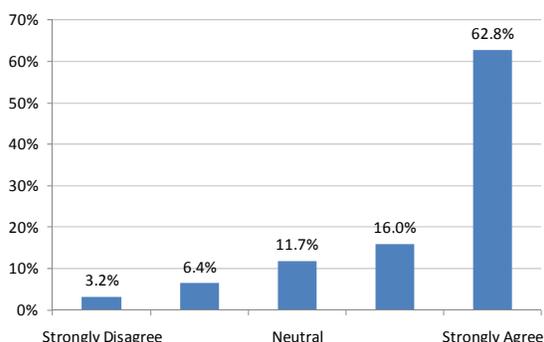
2. PERCEPTIONS

To gauge how important the Windermere TIC is perceived to be to the local economy as well as the wider economy businesses were asked about the value the TIC delivers to visitors, their businesses, and to Windermere town.

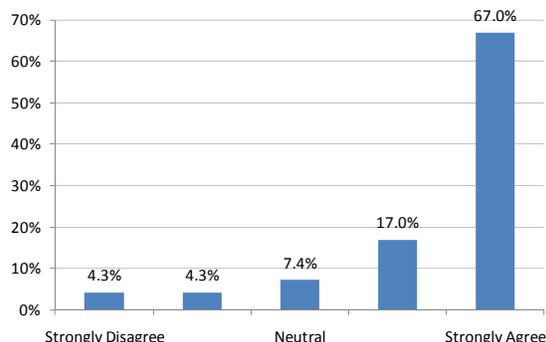
2.1 Value to Visitors

‘To what extent do you agreed to the following statements about the Windermere TIC’

It provides an important feeling of welcome to visitors to Windermere town



It plays an important role as an information point at the gateway of the Lake District



There was a clear indication that the majority of businesses felt the Windermere TIC provides an important first point of contact, especially for new and foreign visitors arriving by public transport or car. Some of the common comments included:

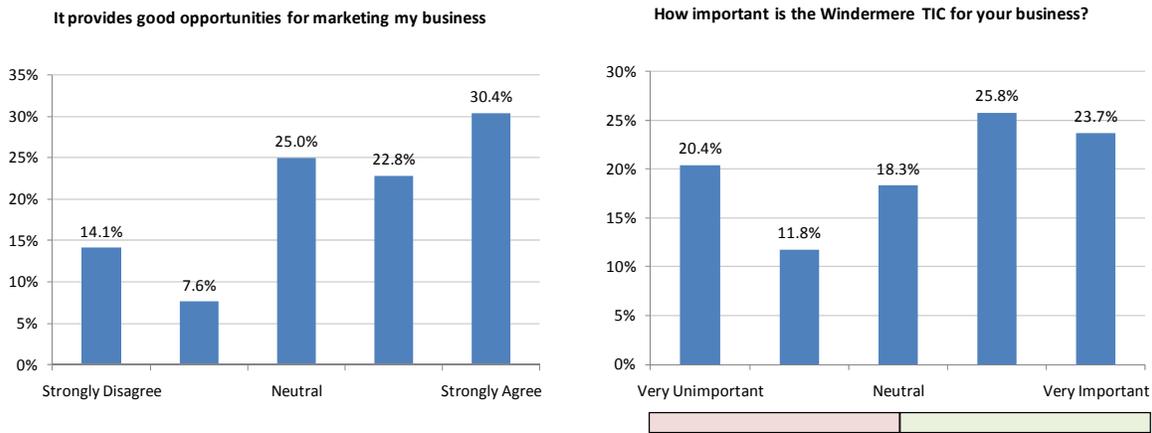
- “We direct all our guests to the TIC especially if they are first time visitors.”
- “The first port of call in the Lakes from the station (bus and trains) and by road.”
- “Windermere is the first point of contact for many visitors to the Lake District, and is the only place with a railway station.”
- “It is the seal on a first class experience. Many guests visit the area for the first time and are hugely appreciative of the vast knowledge of the staff about the area thus saving precious time and significantly enhancing the visitors stay.”

An important message that the majority of businesses felt Windermere TIC delivered was making visitors feel welcome to the Lake District as well as Windermere town. Some comments included:

- “It provides a personal welcome to the area.”
- “If there is no TIC what message does it give visitors as to how welcome they are in the Lakes?”
- “When visitors have information on what they can do in the area they are more likely to enjoy their stay and return in the future.”
- “It sends out a strong message that Windermere is a true tourist destination and that it is a place of interest and choice for tourists.”
- “People will expect there to be a TIC and would be astounded if there wasn’t one in such a tourist area as this”

2.2 Value to Business

To explore how the TIC directly adds value to local businesses we asked the following questions:



Businesses scoring between Very Unimportant to Neutral:

- “We get very little business from it as most people book via the internet”
- “We have a very good repeat business and do not rely on the TIC”
- “I have very few bookings from them. It has transpired that the TIC sends referrals to a favoured few first.”
- “I feel that certain businesses are preferred due to friends or relatives working at the TIC”
- “Utterly useless since the launch of New Vision and DMS booking system.”
- “Internet gives more bookings now.”
- “99% of our business is internet now.”
- “Most are made online either directly or via Cumbria Tourism’s Golakes website.”
- “It does nothing directly but its presence is important.”
- “The TIC does not directly promote our business but provides other essential information to our customers.”

Businesses scoring between Neutral to Very Important:

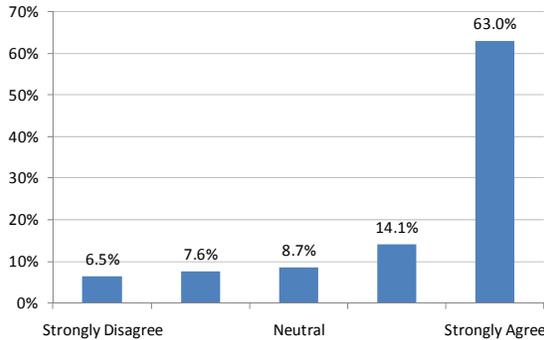
- “It is advertising my business.”
- “As the biggest visitor attraction in the area we attract considerable numbers of independent visitors who gain information about our attraction from the TIC.”
- “We pick up last minute business from visitors enquiring at the TIC.”
- “I get many bookings through Windermere TIC.”
- “My business has advertisements and brochures display.”
- “Often assists in filling the last room on the day.”
- “10-15% of our business comes via TIC. Also helpful if I need to advise guests on particular visitor attractions.”
- “We get quite a lot of business from the TIC through enquiries. The visitor then emails us for more information and we get the booking, but with no credit going to the TIC.”
- “The TICs drive business our way. We attribute approximately 30% of referrals from the Windermere TIC.”

There is a clear divide between businesses who mainly rely on the internet and those who do get business from the TIC. A common theme amongst those who do get business from the TIC was filling last minute bookings. But businesses from both sides acknowledged that the TIC provided “other essential information to our customers.”

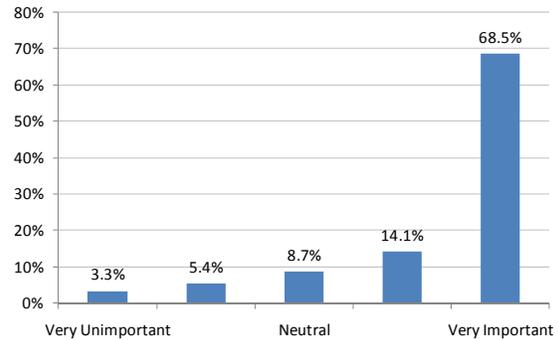
2.3 Importance to the Local and Wider Tourism Economy

To better understand how businesses felt the Windermere TIC delivered value to Windermere town and the local economy we asked the following questions:

It plays an important role in representing tourism businesses in the area



How important is the TIC to Windermere town and the visitor economy?



Businesses scoring Very Unimportant to Neutral:	Businesses scoring Neutral to Very Important:
<p>“People already know about Windermere and its area, and accommodation providers do the “info” supplying part themselves.”</p> <p>“The visitors will continue to come to Windermere whether or not there is a TIC.”</p> <p>“It is no help to Bowness as it tends to look after itself.”</p>	<p>“It is a one stop shop in the area. Staff should be knowledgeable and trusted by visitors to the area.”</p> <p>“It is a vital communication link for visitors, accommodation providers and local attractions.”</p> <p>“We need to make visitors to the Lakes aware of how they can get around to see all the attractions here and what attractions are available where and when.”</p>

Very few businesses, only 9%, rated the importance of the Windermere TIC’s role in the local and wider economy as unimportant. A large majority of businesses feel that the TICs role is to enhance the visitors trip, communicating what the Lake District has on offer, and assisting local businesses to provide a better experience for their guests.

“This in turn increases the likelihood of return visits thus boosting the local economy”
 Guest House owner in the Windermere and Bowness area.

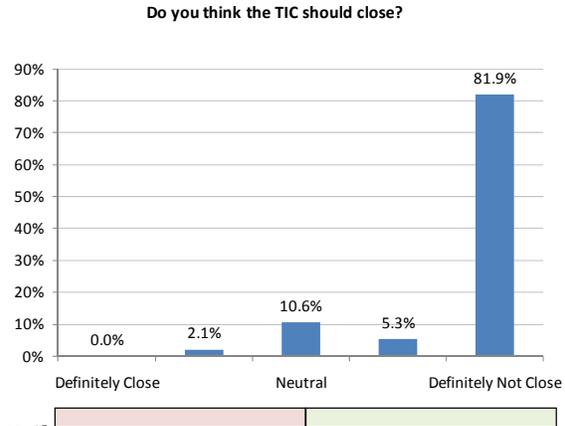
3. ROLE OF THE WINDERMERE TIC

To gauge the appetite for change businesses were asked about the TICs existence, the way it is delivering its services, and what impact a closure would have on their business.

3.1 Should the Windermere TIC Close?

When asked more directly if they thought the TIC should close 82% of businesses indicated that the Windermere TIC should definitely not close.

The reasons people gave ranged from concerns about damaging the visitors experience and the subsequent impact on the tourist economy and their businesses.



Businesses scoring Close or Neutral:

Comments were focused on saving costs to enhance other tourist facilities, such as cheaper parking or more public toilets.

“Non essential services have to be prioritised and there simply isn’t enough cash to go round for everything. If it comes down to a choice between the TIC or public toilets, which do you choose?”

“It is a source of information for those on day trips that do not have the advantage of knowledgeable accommodation providers.”

“Visitors still rely on face to face information provision and leafleting. Until the communications infrastructure allows users to access mobile GoLakes (bearing in mind that you can’t make a voice call in most parts of the Lake District) the closure of the TIC would leave a substantial void in the provision of visitor information in arguably the most important location in the Lake District.”

Businesses scoring Neutral to Definitely Not Close:

“Visitors to the area would lack a dedicated source of local knowledge and advice if the TIC were to close.”

“Without this resource visitors, especially foreigners, would struggle to find information and the visitor economy would suffer.”

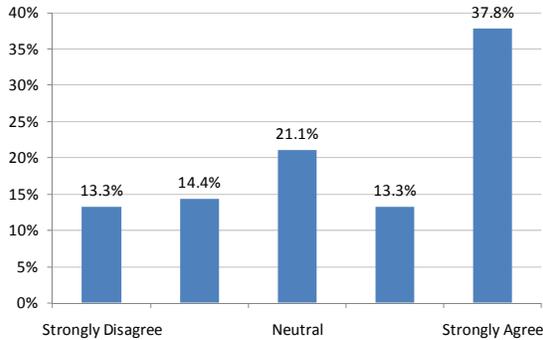
Another very common message from the majority of business who thought the TIC should not close was the disbelief that such as closure is even being considered.

- “The closure of the TICs gives out totally the wrong message to the visitor at a time when we need to be giving out the strongest message that South Lakeland is putting up welcome signs for visitors.”
- “If an area with 10 million + visitors can’t make a case for information centres, who can?”
- “Our area is dependent on just two industries – farming and tourism. For SLDC to suggest that we should not support one of our major sources of income and employment shows that they are completely unaware of this fact and are not fit for purpose.”
- “Where else in the world has popular tourism areas without TICs.”
- “Visitors expect a service – without this the message that is sent out, will be that we as a region do not care enough to provide this for them.”
- “The Lake District’s main business is tourism, how can the SLDC justify closing a TIC? ... by considering only its own internal priorities and not the priorities of the area.”
- “Our regions life is tourism. Closing the centre is giving up on the economy completely.”
- “A market town without shops would fail. A tourism economy without information services and positive visitor engagement would fail.”

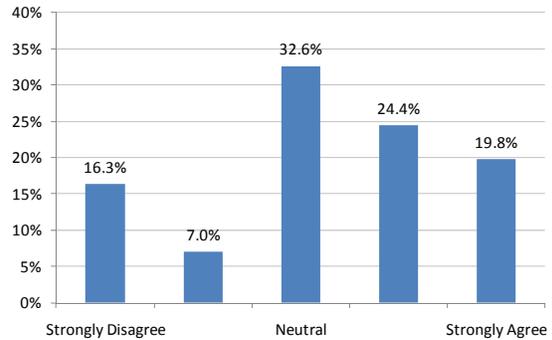
3.2 Is there a need for change?

'To what extent do you agree that the service provided in its existing shape and form needs to continue ... and needs to change?'

The service provided in its existing shape and form needs to *continue*



The service provided in its existing shape and form needs to *change*



Having established that an overwhelming majority of business, 87%, feel the TIC should not close, these graphs suggest there is almost an even split between those businesses who think the existing shape and form of the TIC should continue and those who think it needs to change.

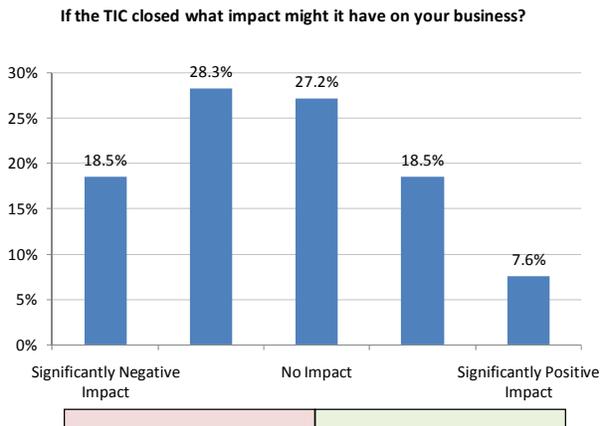
51% of businesses agreed that the current service should continue in its existing shape and form and 44% of businesses agreed that the current service needs to change.

3.3 Impact of a Windermere TIC closure

The businesses were asked what impact a Windermere TIC closure would have on their business.

The businesses that rated a negative impact on their trade stated last minute bookings, referral bookings and marketing opportunities to be at risk. Some businesses also voiced concern about not being able to answer customers questions and be able to refer them onto an up to date source of information.

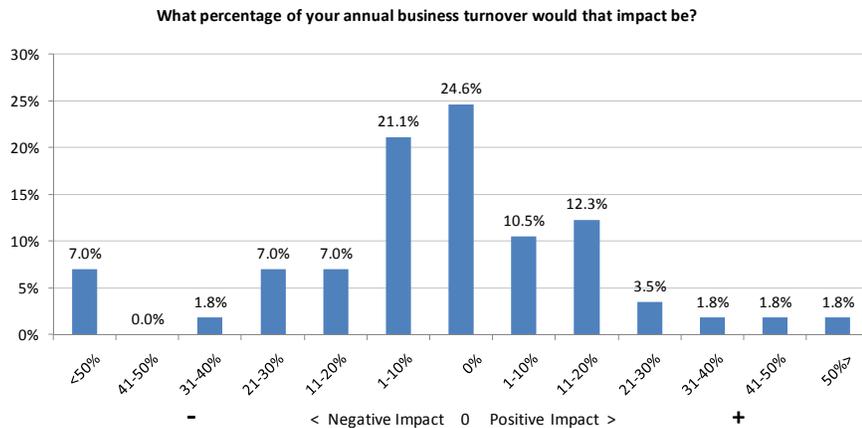
A common characteristic amongst those who rated no impact to a positive impact was the majority of their trade coming in from the Internet. This would suggest the expectation that those currently booking through the TIC would move to online booking channels.



Businesses scoring Significantly Negative Impact to Neutral:	Businesses scoring Significantly Positive Impact to Neutral:
<p>“Visitors experience of the area will be negatively affected and people will not return. We will lose trade and our ability to offer employment and pay local rates.”</p> <p>“I would lose a considerable percentage of my customers who are referred by this TIC.”</p> <p>“We would lose trade from referrals.”</p> <p>“May not sell our last rooms.”</p> <p>“We might be left with empty rooms.”</p> <p>“We rely on our own web, then the TICs to market our guest house.”</p> <p>“Loss of marketing opportunity.”</p> <p>“In the long term TIC closure will make the South Lakes a less attractive place for visitors.”</p> <p>“I refer many customers to the TIC. I would have no other course but to say ‘I don’t know’ to a customer’s question, that’s pretty negative.”</p>	<p>“People making up their own minds would be drawn more to my establishment.”</p> <p>“We are another Information Centre which could benefit from lost visitors. But also the network would break down even further.”</p> <p>“Most booking we have nowadays come via the Internet.”</p> <p>“99% of our business is through the internet so we wouldn’t notice any difference, however, our guests do use the centre especially those travelling by train.”</p> <p>“For the occasional bookings and where our guests can receive extra information we are unable to supply.”</p> <p>“We are in a strong location, but we have only done High Season and during low season I feel we may get more trade from Tourist Information”</p>

Businesses were then asked to quantify the impact if they could, in terms of annual turnover.

The spread of the predicted impact is similar to the above graph, with the impact being evenly spread but skewed to the negative side. There are a few businesses that predict a 50% or greater drop in turnover.



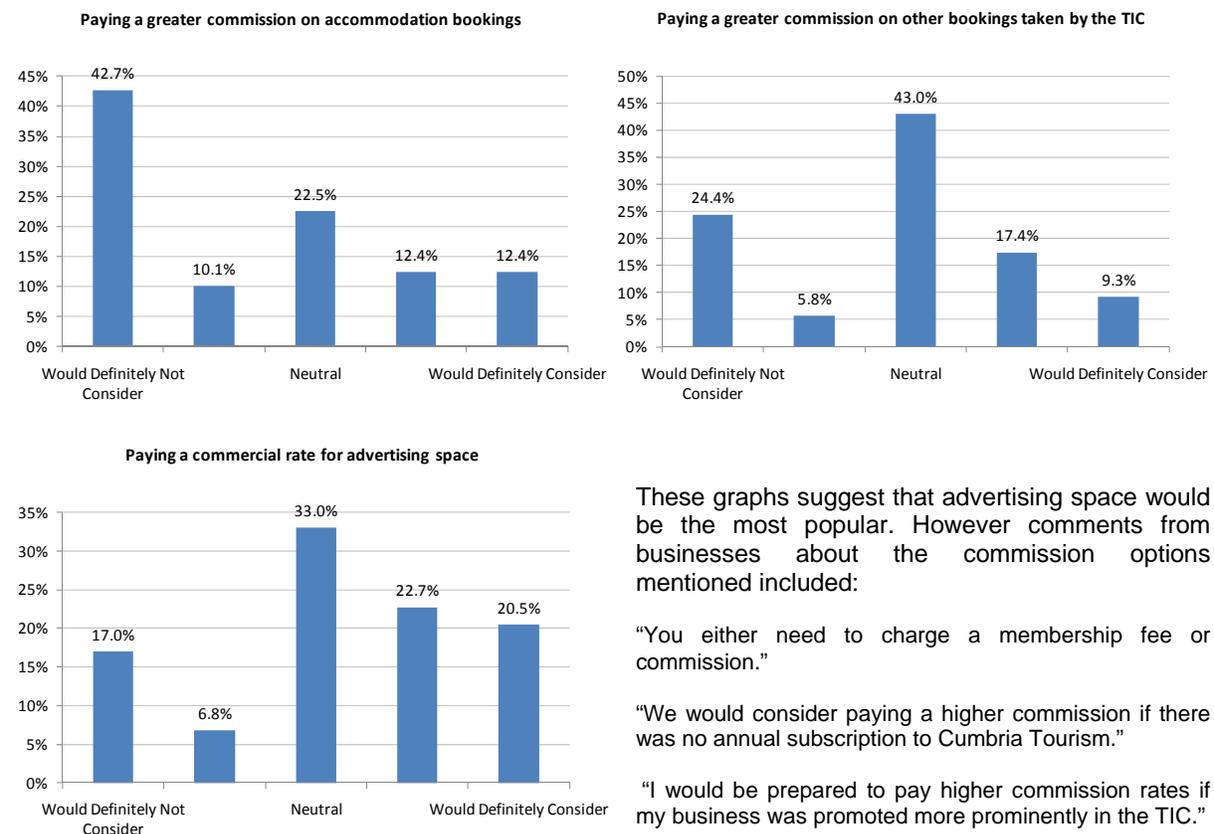
4. FUTURE VISION

To explore the opportunities available for the future of the Windermere TIC we asked businesses about the services provided, the location, and the format in which the TIC is currently being funded and delivered.

4.1 Increasing the Financial Viability

With the aim of making the existing TIC more financially viable we asked if businesses would consider:

- Paying a greater commission on accommodation bookings (currently 10% of the full stay B&B rate, possibly rising to 15% or in line with other commercial booking services)
- Paying a greater commission on other bookings taken by the TIC (e.g. attractions, restaurants, tour bookings etc.)
- Paying a commercial rate for advertising space (Leaflet, poster, digital)



These graphs suggest that advertising space would be the most popular. However comments from businesses about the commission options mentioned included:

“You either need to charge a membership fee or commission.”

“We would consider paying a higher commission if there was no annual subscription to Cumbria Tourism.”

“I would be prepared to pay higher commission rates if my business was promoted more prominently in the TIC.”

Businesses were asked to suggest other products and services that could be provided by the TIC, these included:

- “Made in Cumbria and sell quality products and produce.”
- “Improve the retail/book side.”
- “A greater range of O/S maps, route cards, guide books.”
- “A ‘one-stop’ shop for all visitors where accommodation, food, tours, attractions are all packaged up.”
- “A service like www.toptable.com who run an online booking system for restaurants, including special offers.”
- “Flexible commission rates to match demand levels, which then determines rank positions in listings, like booking.com.”

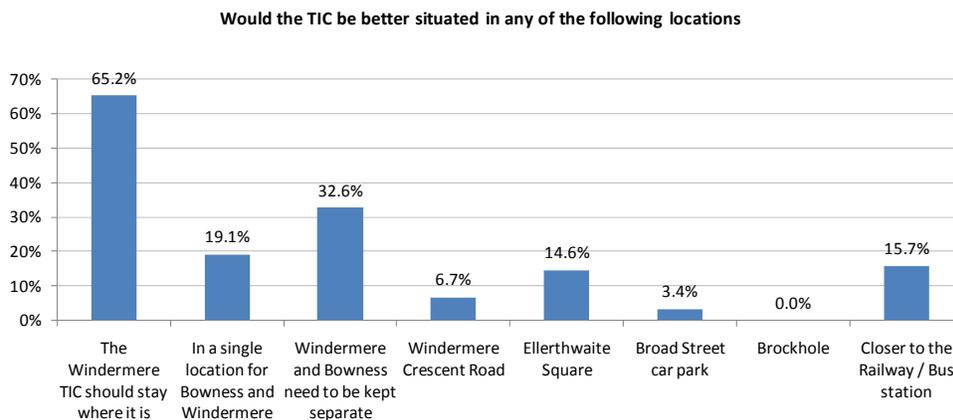
- “Car parking vouchers, per hour.”
- “Internet café with good quality offerings in the café.”
- “Wifi hotspot” “Open longer hours on the weekends.”
- “Rental of shop space to attraction or activity providers.”
- “Bureau de change + a wider retail capacity are essential.”
- “Self service booking kiosks, where visitors can book online. This would free up the staff to focus on the experience aspects of the Lakes, such as the best walks.”
- “Any booking systems you put in needs to be trackable so the business can easily evaluate the service, which would in turn help build the case for continued use.”

Businesses were also asked for any other suggestions that could make the TIC more financially viable, comments included:

- “The TICs are crippled by the internal accounting charges by the council, getting rid of that, along with fresher staff will improve things greatly.”
- “TICs have turned away local commission opportunities as being too unwieldy for a public authority to manage. An active TIC has to engage with local community as well as visitors.”
- Talking about the commission based questions “The incremental introduction of the above suggestions and the ability to sell merchandise for the various attractions will make them profitable.”
- “Various other TICs are capable of running as profitable businesses. Surely Windermere can also be profitable. I would consider a full management review and to focus on the areas which generate profit.”
- “Look at Ambleside TIC – run on a far more commercial basis.”
- “The name has to be changed to something like Visitor Welcome Centres as their primary role will no longer be information if they are to be viable in the future. Welcome Centres need to provide an enhancement such as theatre and event booking, package booking, activity booking, souvenirs, books, lunch, tea, dinner, hosting events etc.”

4.2 Exploring Other Locations

To explore the different locations that the Windermere TIC could be sited on businesses were asked to rate which they thought should be considered.

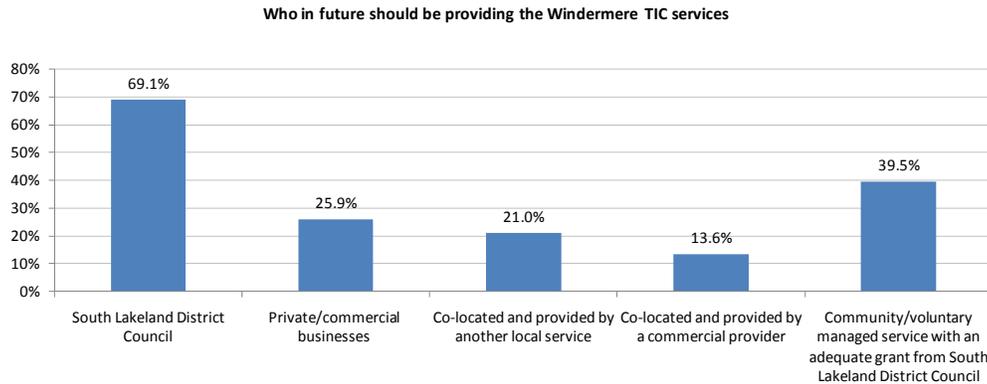


Considering this was a multiple choice question the overwhelming response is that the current location is perceived to be the best possible. Common comments from businesses included:

- “We need all the help we can get and the TIC is located right at the transport entrance to the village. Location is everything.”
- “Current location couldn’t be more ideal”
- “People arriving by train/bus really appreciate the location.”
- “Its current location ... is great for all the visitors coming in by train – this is a high percentage of visitors.”
- “Those arriving by train and looking for accommodation need the facility actually in the station. Those arriving by car without pre-booked accommodation need a large (and cheap) car park adjacent to the TIC.”
- “Current location is not good for parking so it misses visitors by car, or causes traffic jams.”
- “The location needs to be in a highly visible location with parking and not hidden round the back of the library.”
- “Do we discount the needs for short term car parking? There is land behind the TIC that could be better used.”
- “Its only negative is parking.”
- Talking about Windermere and Bowness “The two communities really need separate units accessible by foot from the two centres. It is unrealistic for example to expect a visitor to walk one mile from a B&B in Windermere to Bowness to get ideas, then a mile back.”

4.3 Exploring Different Business Models

To explore how a future Windermere TIC should be run and managed by whom, businesses were asked to tick who they think should be providing the Windermere TIC services.



From the qualitative feedback it was clear to see a difference of opinion amongst some businesses thinking that the TIC needed commercial partners while others thought it needed to stay funded and managed by the public sector.

- “The people running the shop need to be entrepreneurial.”
- “There is too much scraping around to provide adequate funding ... need a leader with more business acumen.”
- “The public sector in this area no longer has the expertise or apparent desire to deliver such a service.”
- “Should be independent of any commercial providers, to be able to be fair to all groups.”
- “The SLDC will be an impartial provider of information and services, which a private business would not.”
- “The TIC, should be a local government backed ‘charity’ supported through the huge business rates we pay.”

Across all of the feedback there was a general consensus that the Windermere TIC needs to become more commercial. In terms of who should be providing the TIC a large majority, 69% of businesses, thought it should be South Lakeland District Council. A feeling of disbelief and anger amongst most of the businesses emerged from the qualitative feedback about the prospect of SLDC allowing the Windermere TIC to close. Some of the common and politer comments included:

- “SLDC should be proud to invest as tourism benefits the whole community. Every private provider of direct and indirect services to the tourism industry makes continual investment in their infrastructure and their services. SLDC needs to adopt the same approach.”
- “The people who pay SLDC money want and need this service. Not a responsibility they can pass on. Who’s interests do they serve if not tourism providers?”
- “This is what we pay our rates for!” “All the rates etc. paid by all businesses is tourist based”
- “We want a better return on our business rates council tax and tax.”
- “SLDC have a statutory requirement to support local business... Tourism is the largest business in this area.”
- “We pay excessive business rates. This money should be used to support the existing, and future TICs.”
- “We must not accept their abdication of statutory responsibility. They provide little or no help to their largest business sector, and with the greatest respect to CT, it is not CT’s job to run TICs.”
- “SLDC needs to be reminded what they are there for, and what the electoral implications will be if they totally abandon the hospitality and leisure sector.”
- “Given the amount that SLDC derives from the visitor in terms of car parking charges, income from lake usage etc SLDC has a moral if not legal obligation to the visitor and it cannot expect to derive ever more income without providing the services.”
- “Closing Windermere TIC, particularly at a time of recession, will have greater negative financial impact on the local economy than any possible cost savings. Unfortunately the cost savings of closure are easy to quantify, the higher cost of closure to the local economy are not – so any easy target really – but the wrong one!”
- “I cannot believe people are considering shutting down the Windermere TIC. This is typical of the modern ‘out of touch’ beaurocrat!”
- “Business rates and council tax continue to rise therefore I believe SLDC have a duty to provide the TIC as part of their support for tourism and tourist businesses locally.”

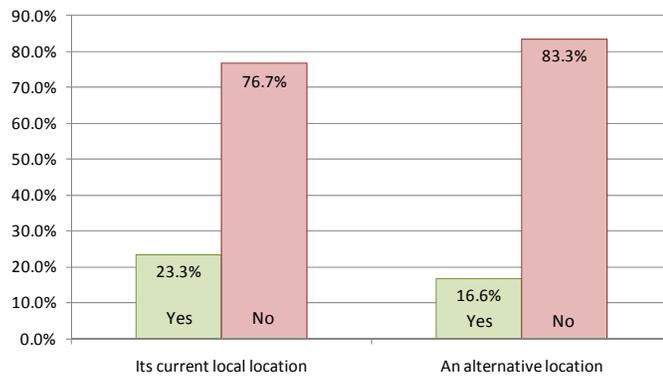
A number of businesses also suggested that Cumbria Tourism could start running them.

- “It is more than apparent from this survey and letters in the Wezzie Gezzie that the CTB are ready to have TICs but don’t wish to run them and are more than willing to pass the buck. I do not think any Council should run a TIC but should be there to provide the infrastructure (loos and car parks for example) TICs are the responsibility of the local Tourist board.”
- “Logically most visitors assume it’s the local tourist authority that runs the show. In my research most visitors don’t understand the difference between the National Trust, National Park and they haven’t the faintest interest in SLDC and none of that is important. They want information and expect the local tourist board to provide this which is exactly what I would expect and experience in my travels. CT .. it’s you that need to take the initiative.”
- “Perhaps Cumbria Tourism could start running them?”
- “As the TIC is a “Tourism” activity how about the CTB running it?”

To gauge the interest level in businesses running or playing a part in running the Windermere TIC we asked if they would be interested.

This graph would suggest that the majority of businesses are not interested in running or collaborating in the provision of a Windermere TIC.

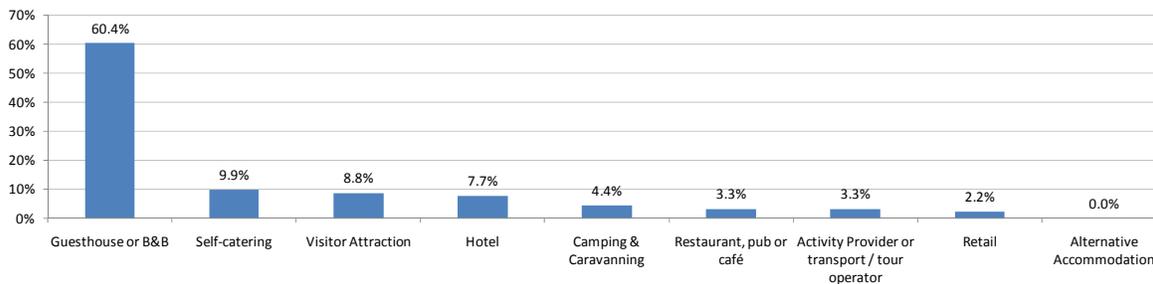
Would you be interested in operating Windermere TIC with a grant payment from South Lakeland District Council?



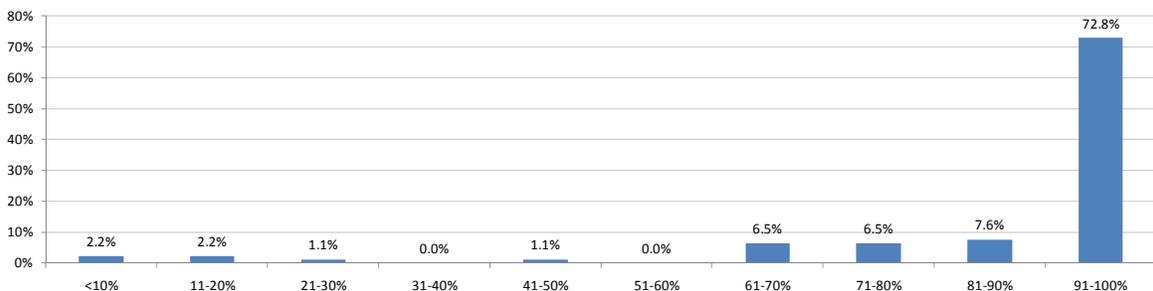
5. BUSINESS PROFILE

98 businesses in the Windermere and Bowness area completed the online survey during the 30th October to the 12th November 2009. To profile the respondents we asked for their main business activity and percentage of business that is tourism trade.

What is your main business activity?



What percentage of your annual business is from visitors?



6. CONCLUSIONS

Does the Windermere TIC add value?

There is a clear perception amongst local businesses that the Windermere TIC adds value to the visitor's experience, which makes them more likely to enjoy their stay and return in future. It was also clear from the businesses qualitative feedback that a perceived role for the Windermere TIC was not only to provide information for Windermere itself but for the rest of the Lake District. It was frequently described as being a gateway to the Lake District and a default location for new visitors to the Lakes. Therefore it was felt that removing this service would have wider implications than just on the local Windermere area.

When it comes to delivering direct value to businesses, such as marketing space or bookings, an even spread of those surveyed said they found that the Windermere TIC did or didn't drive direct value. Those who said it didn't they were clearly more reliant on online booking sources and had greater Internet presence. Those who said the TIC did deliver direct value it was clear that this value was in the form of last minute bookings and referrals. However the majority of businesses, across both groups just mentioned, said that the presence of the TIC was vital as an information service for them and their visitors, acting as a one-stop shop for visitors to find out how to better enjoy their stay in the Lake District. As one business succinctly put it:

"Not only does the TIC provide a vital source of impartial and comprehensive information for the business community, it provides a shop front for the whole area to visitors coming to this unique part of the UK."

Should the TIC close?

From the feedback given and the ratings scored it is clear that an overwhelming majority of businesses feel that not keeping the Windermere TIC open is a clear message from the county to the visitors that 'they are not welcome'. The message to the local businesses would be that 'the county is not serious about tourism'.

Qualitative feedback from the 82% of businesses rating that Windermere TIC should definitely not close suggests that the majority of these businesses would consider it a major failing to stop investment into the Tourist Information Centres and allowing them to close.

What does the future look like?

In exploring the different options for the location of the TIC there was again an overwhelming majority of businesses who felt the current location was perfect, in terms of being in the middle of the main transport hubs and routes into the Lake District. The main weakness of the current location that was mentioned was the lack of car parking. A few suggestions on clearer signage to parking, patrolled 10 minute parking outside, or better use of the space behind the TIC might help.

There was a clear consensus amongst businesses that the Windermere TIC should become more commercial, with advertising space rated as the most popular option for increasing revenue from businesses themselves. Businesses suggested a number of products and services that could be provided; from 'Made in Cumbria' produce to more maps, from restaurant bookings services to packaging of local attractions and offerings.

When asked who they thought should be providing the TIC a difference of opinion emerged. Some businesses thought that the TIC needed commercial partners while others thought it needed to stay funded and managed by the public sector.

A few businesses stated that the local Tourism Board should be providing the TIC service. However a large majority, 69% of businesses, thought it should be South Lakeland District Council providing the TIC. The qualitative feedback strongly indicated a general feeling of disbelief and anger amongst local businesses at the prospect of SLDC allowing the Windermere TIC to close.