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# **WINDERMERE AIRSHOW**

## **25 - 26 JULY 2009**

### **Visitor Survey and Economic Impact Analysis**

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## INTRODUCTION

In 2009 the Windermere Airshow took place for the ninth year running. The programme covered Saturday 25<sup>th</sup> and Sunday 26<sup>th</sup> July and covered a wide variety of activities and air displays. Festival organisers and partners were keen to do some research to monitor the profile of participants, gather essential feedback, and estimate the potential economic impact of the event on the area, in terms of tourism benefit. This information will help to inform marketing, planning, and fund-raising for the festival in future years.

Four students were used throughout the weekend to secure interviews. In addition two Rotary Club volunteers each spent part of one day interviewing event-goers. Interviewers were instructed to sample at various locations, and at various times of day to ensure a representative sample. They were also instructed to use random sampling techniques to reduce interviewer bias, to only interview people aged 16 or over, and to only interview one person per party.

Questionnaires were kept short to make them easy to complete. Event organisers estimate that 20,000 people attended on the Saturday (sunny), and a further 7,000 on the Sunday (wet) – a total of 27,000\*. 424 questionnaires were completed, a sample size of 1.6% of the total population. A sample of this size statistically produces answers at a 95% confidence level that will be accurate to +/-4.7% or better. This means that if you were to conduct the same survey 100 times, the results would be within +/- 4.7% of the first time you ran the survey 95 times out of 100. It is generally accepted that an error level of +/-5% at the 95% confidence level is acceptable, and this survey sample falls within that range.

59% of interviews were carried out on the Saturday and 41% on the Sunday.

Questionnaires were input and the results analysed by Cumbria Tourism - this report details the results. A copy of the questionnaire is at the end of this report.

All 'no replies' and 'don't know' answers have been excluded from analysis.

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\* NB There are in addition significant numbers of people watching the Airshow from numerous vantage points on and around the lake, including hotels, hills, gardens, and boats on the lake itself (an estimated 4,000) but these people have not been included in the final attendance figures for the purposes of this analysis.

# Executive Summary

- **51% of those surveyed had not been to previous Airshows**
- **79% arrived by car, 10% were on foot**
- **73% of people surveyed had seen an air display – 54% had seen either the Red Arrows or the Vulcan Bomber**
- **69% thought the event was ‘good’, and 25% ‘ok’.**
- **32% thought the food and drink offer was ‘not so good’ and this was also borne out in the feedback people gave, with the need for more food and drink the top issue.**
- **Other issues which need investigation for future Airshows include the need for more to do on the ground, a clear advantage to be had for paying to get into certain areas, and improvements to toilet facilities.**
- **Half of those surveyed were between 35-54 years old. A fifth were between 55-64.**
- **61% were with other family members and 40% with their spouse/partner.**
- **Average party size was 4.2 people. 30% were children.**
- **63% were visiting from outside of Cumbria – the majority were from the North West.**
- **43% of visitors said they made their trip specifically to see the Airshow.**
- **21% of visitors were day trippers.**
- **Average length of stay was 4.9 nights.**
- **41% of visitors stayed in hotels or b&bs, 21% were in caravans and 13% camping.**
- **One in ten were visiting Cumbria for the first time.**
- **91% said they would definitely return to Cumbria – the Lake District in the next two years. 97% said they would return to a future Windermere Airshow.**
- **Compared to other events the Windermere Airshow attracted a large audience. The event was not a hugely significant driver to visit – 43% of tourists made their trip specifically for the event, compared to an average of 64% across all other events.**
- **However the large audience and low event costs result in a significant tourism economic impact – estimated at £4.06m, with a massive return on investment (ROI) of £130.95 for each pound spent.**

# Windermere Airshow

## All Respondents

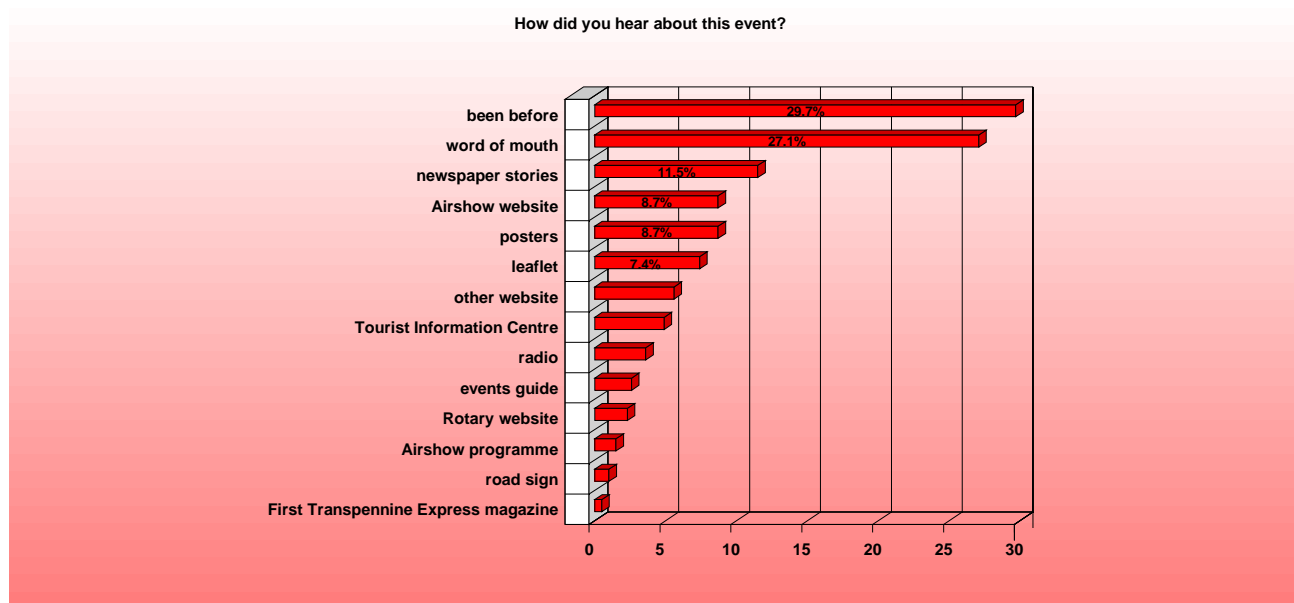
*This section is looking at responses from the whole sample – and therefore includes both local residents and visitors from further afield.*

### Previous Visits

Just under half of those surveyed had been to the Airshow in previous years, but 51% were new visitors. This suggests that as well as securing some loyal, repeat visitors, the event had also successfully attracted new markets.

### Awareness

The majority of people at the Airshow had either been before (30%) or heard about it through word of mouth (27%). (NB for visitors this may be via their accommodation providers). Newspaper stories were the next most effective marketing tool, accounting for 11% of participants' awareness of the event. Around 8% of people had heard about the event through either leaflets, posters or the Airshow website.



There were significant differences in the importance of marketing methods for new, as opposed to repeat visitors. 39% of those who had not been to previous Airshows heard about the event through word of mouth, 15% through newspaper stories, 13% through the Airshow website, 12% from posters and 8% from other websites (which may include Cumbria Tourism's golakes website).

Visitors from outside the county were less likely to have seen newspaper stories than Cumbrian residents, and they were more likely to have used the Airshow, or other websites (20% of visitors in total).

Men were more likely than women to have seen newspaper stories or used the Windermere Airshow website. Women were more likely than men to report having seen leaflets.

People interviewed on the Sunday were more likely to have been before (36%) – these people may have decided to come specifically for the Red Arrows.

## Transport

79% of people attending the Airshow travelled by car. One in ten (10%) were on foot, 4% came by bus and 2% by train.

People who had been to the event in previous years were more likely to have come on foot (14%), and those visiting for the first time were more likely to have used private transport (84%).

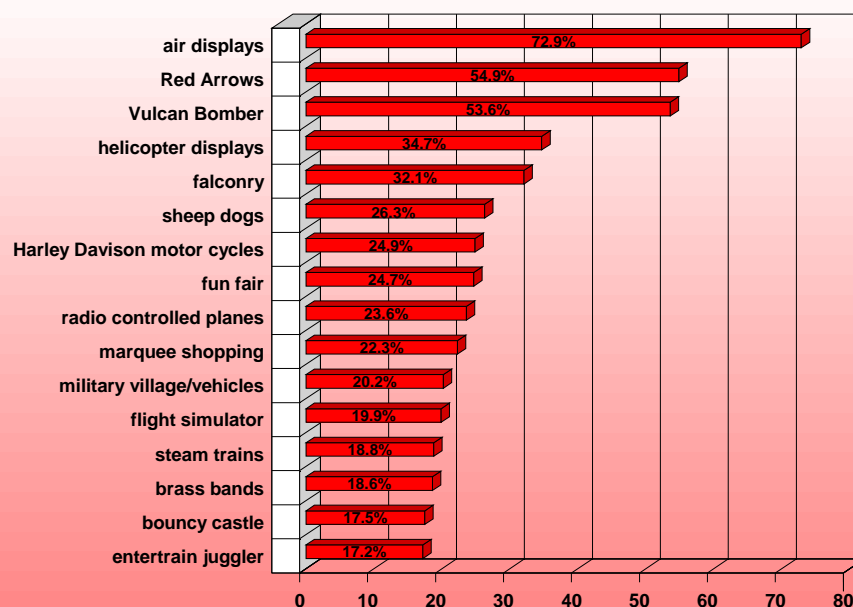
Visitors from outside of the county were more likely than local residents to use their cars – 82% of tourists came by car, whereas locals were more likely to have gone on foot (17%).

The younger age groups were more likely to have chosen public transport, and the oldest age groups slightly more likely to have walked to the event.

## Events

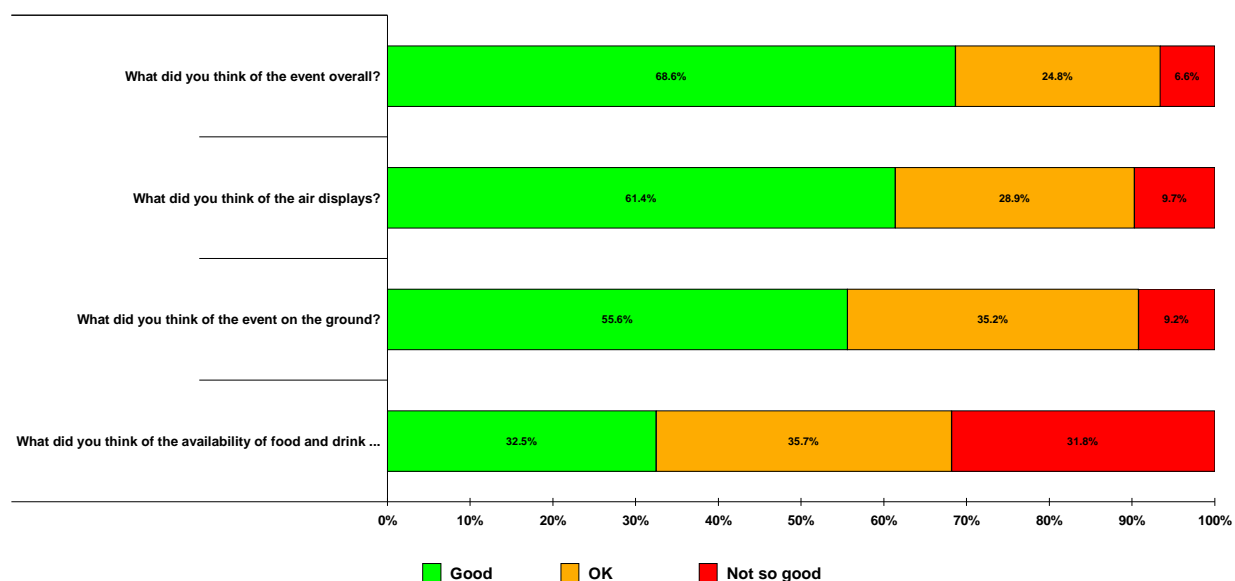
The air displays were the most popular, with 73% of visitors having seen some form of display, followed by 54% the Red Arrows or the Vulcan Bomber specifically. Next most popular were the helicopter displays and falconry at 35% and 32% respectively.

About a quarter of people had seen the sheepdog displays, the Harley Davison motor cycles and the fun fair, and around a fifth had seen the radio controlled planes, been shopping in the marquee or visited the military village/vehicles. There was little variation by type of visitor.



## Satisfaction

People were asked what they thought of the event.



In general terms, satisfaction rates were good, with 69% of people saying the event was ‘good’ and a further 25% that it was ok. People thought more highly of the air displays than they did about the event on the ground. 61% thought the air displays were good (29% ok) and 56% thought the event on the ground was good (35% ok). The food and drink offer was not highly thought of, with a third of visitors saying it was good, but almost another third saying it was not so good.

This was borne out in the comments people made about the event. 220 people made comments and they have been grouped into key themes:

Issue	Number remarking
Needs more food and drink	57
Excellent, fantastic, good, very good, nice	39
Not enough to do on the ground – need more stalls e.g. local produce and crafts, more entertainment, more displays, more for adults, maybe planes on the ground	27
Programme too expensive, not happy about paying to get into areas when others view for free, and no advantage as some had worse views, and less food offer	19
Need better/more parking, disabled parking	13
Too long between air displays	13
Disappointed no toilets, not enough toilets, poor toilets	11
Needs better publicity	9
Well organised	9
Disappointed cancelled acrobats/planes	9
Not as good as last year	6
More flying displays	5
Keep up the good work	5
Dislike PA system, not audible on the hill, dislike music	5
Lack of signs	5
Want programme in advance	5
Lack of information	4

<b>Issue</b>	<b>Number remarking</b>
Food and drink expensive	4
Bus problems – not enough room, times not late enough	3
Badly organised	3
Disappointed planes late	2
Disappointed no refreshments	2
Disappointed	2
Liked parking	2
Air displays should start earlier	1
Not value for money	1
Parking expensive	1
Needs better viewing	1
Good value for money	1
Would like a seat – deckchair hire?	1

Despite some of the criticism, a reassuring 97% of people said they would come to a future Windermere Airshow.

# Respondent Profile

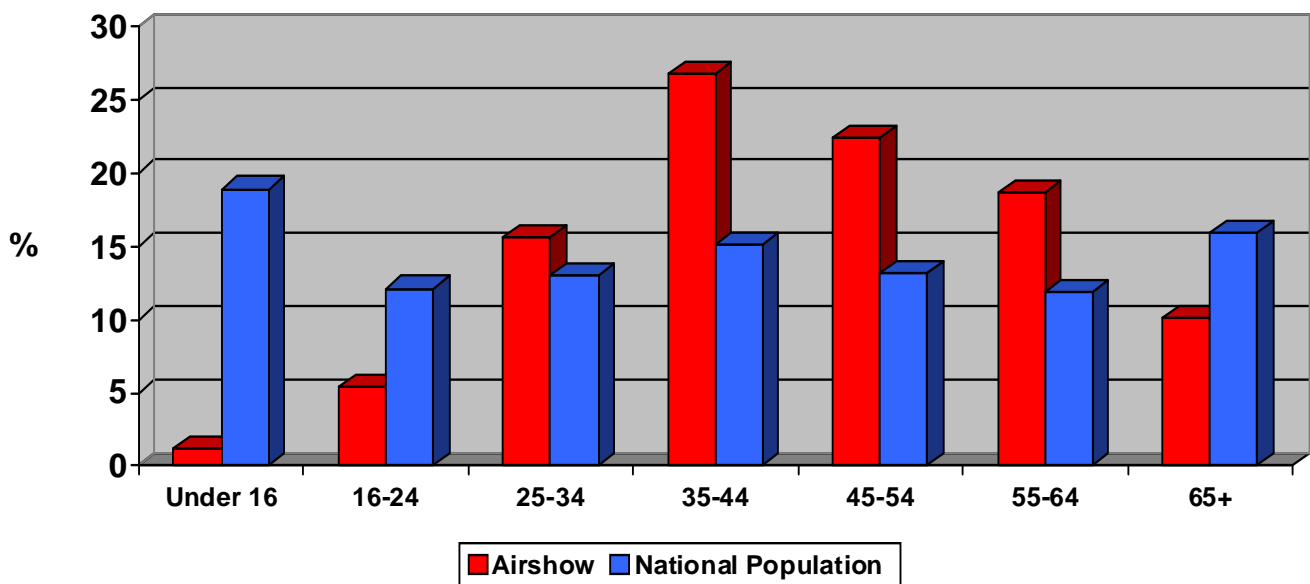
## Gender

Male 49.1%      Female 50.9%

Female respondents marginally outnumbered males, in line with the national population (there are around 51.6% women and 48.4% men in the national population).

## Age

Almost half of respondents were aged between 35 and 54 years old. Almost a fifth were aged between 55-64 years old. Both the youngest and oldest age groups (under 25s and over 65s) were under-represented in comparison to the national population. NB Interviewers were instructed not to interview those under the age of 16 which will affect these figures.



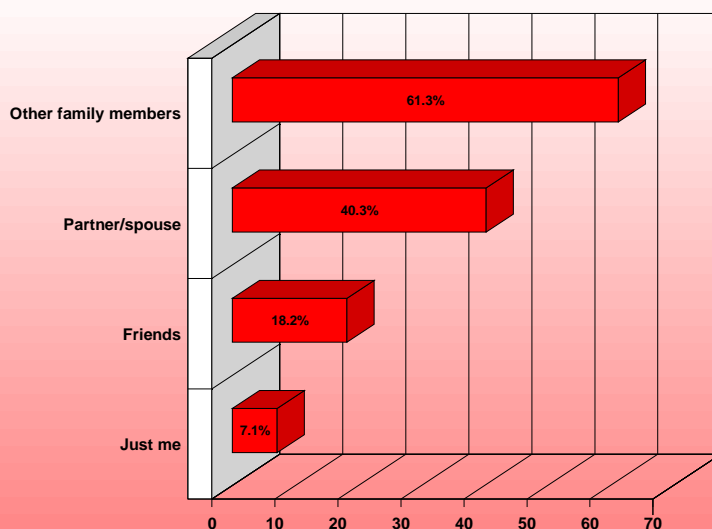
Source: Census mid-2007 Estimates (UK) Office for National Statistics

## Party Composition

Most people were with other family members, and 40% with their other halves. Almost a fifth were groups of friends and 7% were on their own.

People in the 55 – 64 age bracket were most likely to be either on their own or with their partner/spouse. 35-44 year olds were most likely to be in family groups, and those under 24 most likely to be with friends. People living in Cumbria were also more likely to be with friends than visitors were.

NB This was a multiple choice question and so responses may add up to more than 100%.



## Party Size

The 424 people completing questionnaires formed part of a larger group of visitors. 420 people provided information on party size. These 420 along with their friends and families totalled 1,751 people in total, and 518 (30%) of these were children. The average party size was 4.2 people.

Party size (based on sample)	Number	%
1	29	7%
2	107	26%
3	56	13%
4	108	26%
5	35	8%
6	31	7%
7-10	38	9%
11+	16	4%
<b>TOTAL</b>	<b>420</b>	<b>100%</b>

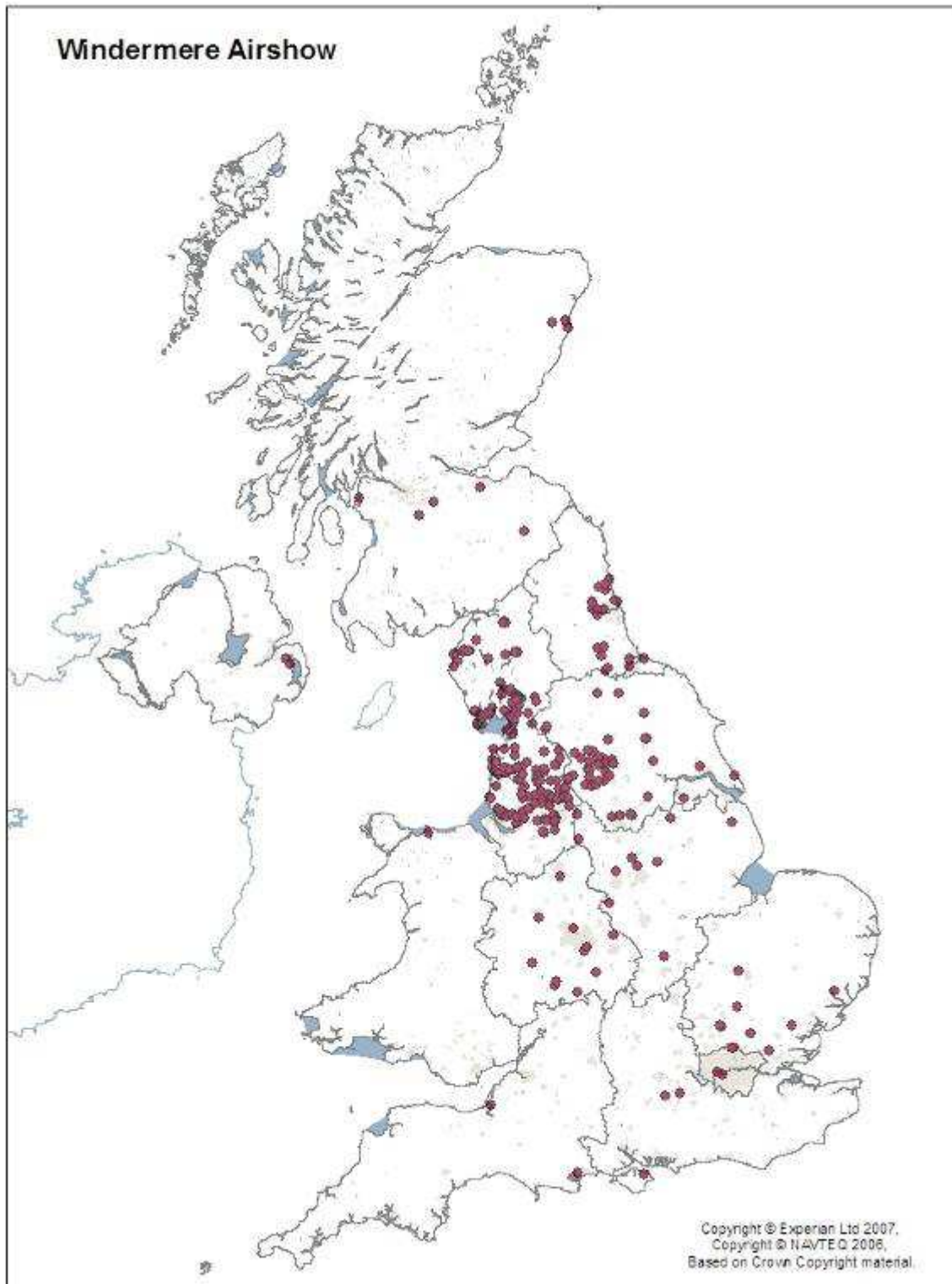
The majority of people came in twos or fours (26% each), but party sizes varied, the largest being 55 local people, consisting of 15 adults and 40 children.

## Locals/Visitors

The majority of people attending Windermere Airshow participating in the survey were visitors to the county (63.7%) rather than Cumbrian residents (36.3%).

## Origin

The map below shows the origin of people attending the Windermere Airshow. 338 valid postcodes were recorded. These are shown on the map. People came from all over the country, with a concentration in Cumbria and the North West.

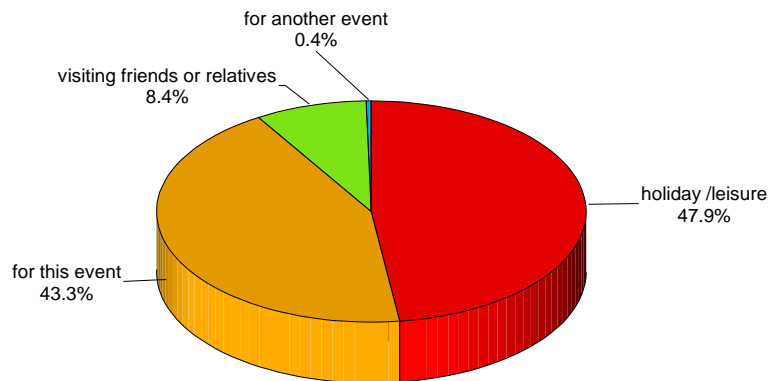


# Visitor Profile

*This section is looking at responses just from tourists – those living outside of Cumbria. Approximately 200 tourists completed surveys (some variation by question).*

## Visit Motivation

43% of visitors said they had made their trip specifically to see the Airshow. Another 48% were on holiday here, and 8% were visiting friends and relatives.



## Trip Length

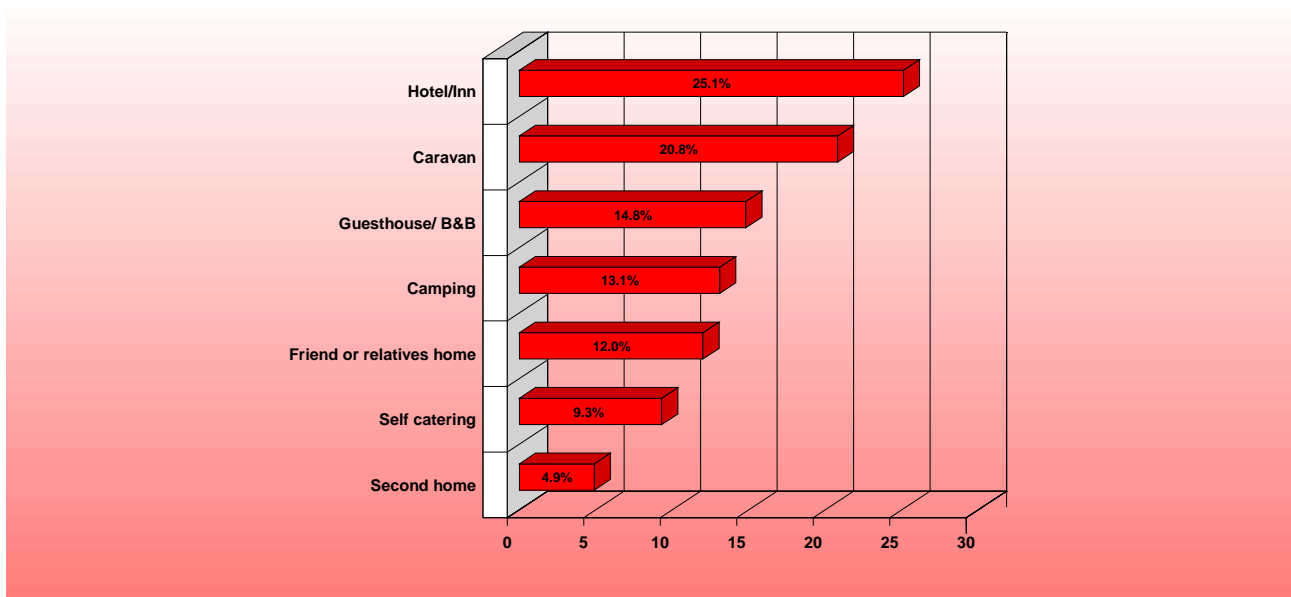
21% of people coming from outside of the county for the Airshow were just visiting for the day, and 79% were staying overnight. A quarter of the staying visitors were only staying for two nights, in total 44% were staying for 2-3 nights. Almost a fifth were in the county for a week, and 14% were staying for longer.

Trip Length	Number	%
1 night	16	9%
2 nights	45	25%
3 nights	33	19%
4 nights	13	7%
5 nights	8	5%
6 nights	6	3%
7 nights	32	18%
more than 7 nights	24	14%
<b>TOTAL</b>	<b>177</b>	<b>100%</b>

The average length of stay for staying visitors was 4.9 nights.

## Accommodation Type

Of those visitors staying overnight, 41% were using serviced accommodation – 25% hotels and 15% guesthouses or b&bs. One in five were in a caravan, and 13% were camping. 17% were staying either with friends and relatives, or in a second home (effectively ‘free’ accommodation).



Compared to visitors to Cumbria generally (data from the 2006 Cumbria Visitor Survey, being updated in 2009), people visiting for Windermere Airshow were more likely to be staying in hotels/inns, but much less likely to be self catering. It is likely that choice of accommodation will be significantly influenced by length of stay.

People who had never been to the Airshow before were more likely to be staying in hotels, whereas repeat visitors were more likely to be staying in caravans.

## Party Size by Accommodation Type

Group size varied according to the type of visitor – whether day or staying, and in what type of accommodation used. Day visitors came in the smallest parties, while the larger groups favoured caravan, camping or self catering options.

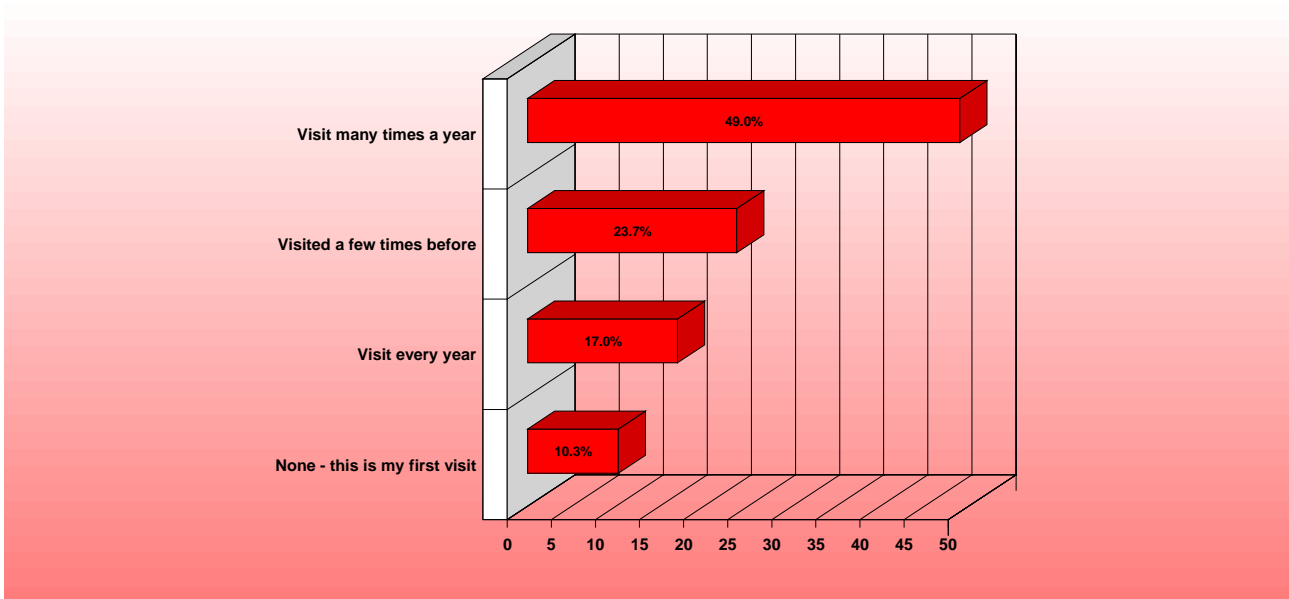
Visitor Type	Average Group Size
Day visitor	3.3
Serviced	3.8
Friends, relatives, or second home	4.2
<b>OVERALL AVERAGE</b>	<b>4.2</b>
Caravan	4.2
Camping	4.3
Self catering	4.5

## Length of Stay by Accommodation Type

People at the Windermere Airshow were in Cumbria on fairly long breaks, averaging at 4.9 nights. Visitors using serviced accommodation, or camping stayed for the shortest times. Those using self catering accommodation including caravans were on the longest trips of around a week.

Accommodation Type	Average Length of Stay (nights)
Friends, relatives or second home	3.7
Serviced	3.7
Camping	3.9
<b>OVERALL AVERAGE</b>	<b>4.9</b>
Caravan	6.7
Self catering	8.5

## Visitor History



The majority of people at Windermere Airshow were fairly frequent visitors to the county –half said they visit Cumbria many times each year. 24% said they had been a few times before and another 17% visit at least once a year.

One in ten (10%) were completely new visitors.

Visitors new to Cumbria were more likely to have attended the event on the Saturday, while those making multiple trips each year were more likely to have been found on the Sunday.

## Future Plans

91% of those interviewed said they would definitely be returning to Cumbria – the Lake District in the next two years. A further 7% said they would possibly return, leaving just 1% unlikely to.

# Economic Impact Analysis – Tourism Only

The economic impact assessment is a fairly rudimentary analysis. It uses information from the Windermere Airshow survey for the profile of visitors, and from the 2006 Cumbria Visitor Survey for estimates of expenditure (these are indexed to 2008 prices and will be updated during 2009). It is only assessing the economic impact relating to tourism – Cumbrian residents are excluded from this analysis.

First the expenditure of the sample surveyed is calculated. This includes the whole party and their entire trip. The sample surveyed were estimated to spend £147,229 between them on their visit to Cumbria. 43.3% of these people were motivated to make their visit specifically for the event, so this proportion of expenditure can be fairly attributed to the event. This figure is £63,750. This assumes that all expenditure by the whole party on their entire trip can be attributed to the event.

These findings are then extrapolated to draw conclusions for the event overall, rather than just for the sample surveyed. Based on the sample surveyed, and given an estimated 27,000 attendees, of which 63% would be tourists from outside the county, and 43% driven to visit purely by the event, then the Windermere Airshow was estimated to draw in £4.06m in tourism value to the county. This does not include any revenue generated by locals spending over the weekend – and 27% of respondents were from within Cumbria.

The return on investment is estimated at £131 for every pound spent. However, it is important to note that the Airshow has a substantial 'hidden' cost as all of the organisation is done by members of Windermere Rotary Club. An estimated 2,100+ volunteer hours are involved in the preparation and hosting of the event, which are not included in the total event costs for the purposes of this analysis. Please note also that this calculation uses the entire event expenditure figure, but only the tourism economic impact in terms of revenue. It does not take into account any additional value the event may have brought in terms of PR value and improved awareness/perceptions of the area.

There are many different types of events – active outdoor events, cultural displays, first time events and regular annual events. It is difficult to make direct comparisons between such a diverse range of events, some of which also take place over a number of days and others which are one-offs. However, by looking at indicators such as the numbers of visitors and locals attracted to events, visitors' motivations for making trips, and tourism income alongside event expenditure, it is possible to make some comparisons.

Compared to other events (nine assessed to date in 2008/9), the Windermere Airshow attracted a large audience. The event was not a hugely significant driver to visit – 43% of tourists made their trip specifically for the event, compared to an average of 64% across all other events. However the large audience and low event costs result in a significant tourism economic impact – estimated at £4.06m, with a massive return on investment (ROI) of £130.95 for each pound spent.

# Economic Impact Analysis – Tourism Only

<b>Windermere Airshow</b>	
Total Participants	27,000
Sample Surveyed	424
Response Rate	1.57%
<b>Source: Windermere Airshow Survey 2009</b>	
No. of visitors	269
Proportion of visitors	63%
Proportion of Overnighters	79%
Proportion of Day Trippers	21%
Day trippers	47
Overnighters in self catering	17
Overnighters in serviced	73
Overnighters in caravan	38
Overnighters in camping	24
Overnighters in hostel	0
Overnighters staying with friends/relatives/second home	22
Average Group Size - Self Catering	4.5
Average Group Size - Serviced	3.8
Average Group Size - Caravan	4.2
Average Group Size - Camping	4.3
Average Group Size - Hostel	0.0
Average Group Size - SFR	4.2
Average Group Size - Day	3.3
Average Length of Stay - Self Catering	8.5
Average Length of Stay - Serviced	3.7
Average Length of Stay - Caravan	6.7
Average Length of Stay - Camping	3.9
Average Length of Stay - Hostel	0.0
Average Length of Stay - SFR	3.7
<b>Rates of Daily Expenditure Per Person</b>	
	£
Average Daily Exp - Overnighter	18.80
Accomm cost per person day (self catering)	23.42
<b>Total spend per person day (self catering)</b>	<b>42.22</b>
Accomm cost per person day (serviced)	41.16
<b>Total spend per person day (serviced)</b>	<b>59.96</b>
Accomm cost per person day (caravan)	17.63
<b>Total spend per person day (caravan)</b>	<b>36.43</b>
Accomm cost per person day (camping)	5.36
<b>Total spend per person day (camping)</b>	<b>24.16</b>
Accomm cost per person day (hostel)	17.17
<b>Total spend per person day (hostel)</b>	<b>35.97</b>
Accomm cost per person day (SFR)	0.00
<b>Total spend per person day (SFR)</b>	<b>18.80</b>
<b>Average Daily Exp - Day Visitor</b>	<b>20.16</b>
<b>Source: Cumbria Visitor Survey 2006. Figures adjusted for 2008 (+1.08)</b>	
<b>Impact Based on Sample</b>	
Total Person Nights (self catering)	650 total people x average group size x average length of stay
Total Person Nights (serviced)	1,026
Total Person Nights (caravan)	1,069
Total Person Nights (camping)	402
Total Person Nights (hostel)	0
Total Person Nights (SFR)	342
Total Person Day Visit Days	155
Expenditure - self catering	£27,454 total person nights x daily spend
Expenditure - serviced	£61,542
Expenditure - caravan	£38,955
Expenditure - camping	£9,724
Expenditure - hostel	£0
Expenditure - SFR	£6,427
Expenditure - Day Visits	£3,127
<b>Total</b>	<b>£147,228.70</b>
<b>These are just the impacts associated with those people completing the survey. These figures include everybody.</b>	
<i>% of visitors motivated to visit by the event itself</i>	43.30%
<i>"true" economic impact of sample</i>	<b>£63,750.03</b>
<b>This takes account of those specifically motivated to take a trip by this event, and assumes that all the expenditure by their party on their entire trip can be attributed to the event.</b>	
<b>Impact Based on Event</b>	
Total	£9,375,412.77
<b>This assumes that the findings from the survey can be extrapolated to draw conclusions for the event overall. For those motivated to make the trip by the event itself, entire trip expenditure is attributed to the event. Tourists who happened on the event, and did not decide to make their visit because of the event are excluded from this calculation.</b>	
<i>% of visitors motivated to visit by the event itself</i>	43.30%
<i>"true" economic impact</i>	<b>£4,059,553.73</b>
<b>Return on Investment</b>	
Event Expenditure	£31,000
Economic Impact	£4,059,553.73
<b>Return per £ spent</b>	<b>£130.95</b>

# Questionnaire



Cumbria Tourism

## Windermere Airshow 2009

Hello, I am working on behalf of the Rotary Club to ask people about their visit today. It would really help if you could spare few moments to enable us to plan for, and market future events. The information you provide will be completely confidential.

Date: \_\_\_\_\_

Location: \_\_\_\_\_

What is your home postcode?  
\_\_\_\_\_

How did you travel to Windermere today?

- car/van     train     park and sail  
 motorbike     bus     boat/ferry  
 camper van/motor home     coach     on foot  
 cycle

Have you been to Windermere Airshow in previous years?     Yes     No

What parts of the event have you seen/done ?

- air displays     falconry  
 Vulcan Bomber     entertrain juggler  
 Red Arrows     steam trains  
 helicopter displays     radio controlled planes  
 fun fair     brass bands  
 flight simulator     Harley Davison motor cycles  
 military village/vehicles     bouncy castle  
 sheep dogs     marquee shopping

What did you think of the event overall?

- Good     OK     Not so good

What did you think of the air displays?

- Good     OK     Not so good

What did you think of the event on the ground?

- Good     OK     Not so good

What did you think of the availability of food and drink in and around The Glebe?

- Good     OK     Not so good

How did you hear about this event?

- Airshow programme     First Transpennine Express magazine     leaflet  
 been before     newspaper stories     posters  
 Airshow website     events guide     radio  
 Rotary website     word of mouth     Tourist Information Centre  
 other website

Would you come to another Windermere Airshow in future?     yes     no

Do you have any comments you would like to make about the event:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Are you:     male     female

Which is your age group?

- under 16     25-34     45-54     65+  
 16-24     35-44     55-64

Who else is with you at the event today? (please tick all that apply)

- Just me     Friends  
 Partner/spouse     Holiday tour/special interest group  
 Other family members

Please tell us the number of people, including yourself:

TOTAL .....   
 adults (18+) .....   
 children.....

Do you live locally or outside Cumbria?

- Live in Cumbria    Thank you - the rest of the questionnaire does not apply to you. Close interview.  
 Visitor

What is the main reason for your visit to Cumbria?

- holiday /leisure     visiting friends or relatives  
 for this event     for another event

How many nights are you staying in

Cumbria ? If only here for the day please put in a zero and skip the next question.   

What sort of accommodation are you using?

- Hotel/Inn     Caravan     Second home  
 Guesthouse/ B&B     Camping     Friend or relatives home  
 Self catering     Hostel-style

How many times have you visited Cumbria in the past? Please tick the box that describes you best.

- None - this is my first visit     Visit every year  
 Visited a few times before     Visit many times a year

Do you think you will make a return trip to Cumbria in the next two years?

- Definitely     Possibly     Unlikely

Thank you very much for your help. Enjoy the rest of your day!