

UNDERSTANDING THE IMPACT OF WWI RELATED TOURISM

3 OCTOBER 2013
OECD CONFERENCE IEPER

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Monitoring WWI related visitors

A tradition since 1998

Opening of the new interactive museum 'In Flanders Fields Museum' (Ieper)



➤ Visitor survey 1998

- Appreciation of the new interactive tools
- Information about visitors profile (origin, day visitors versus overnight visitors, individual visitors versus adult groups versus school visitors, age groups and with/without children)
- Information about the visitor behaviour (duration of visit, repeat visit)

➤ Yearly visitor survey since 1999

- Basic parameters for detecting trends
- Changing topics per year: appreciation of the visitor centre, appreciation of temporary exhibitions

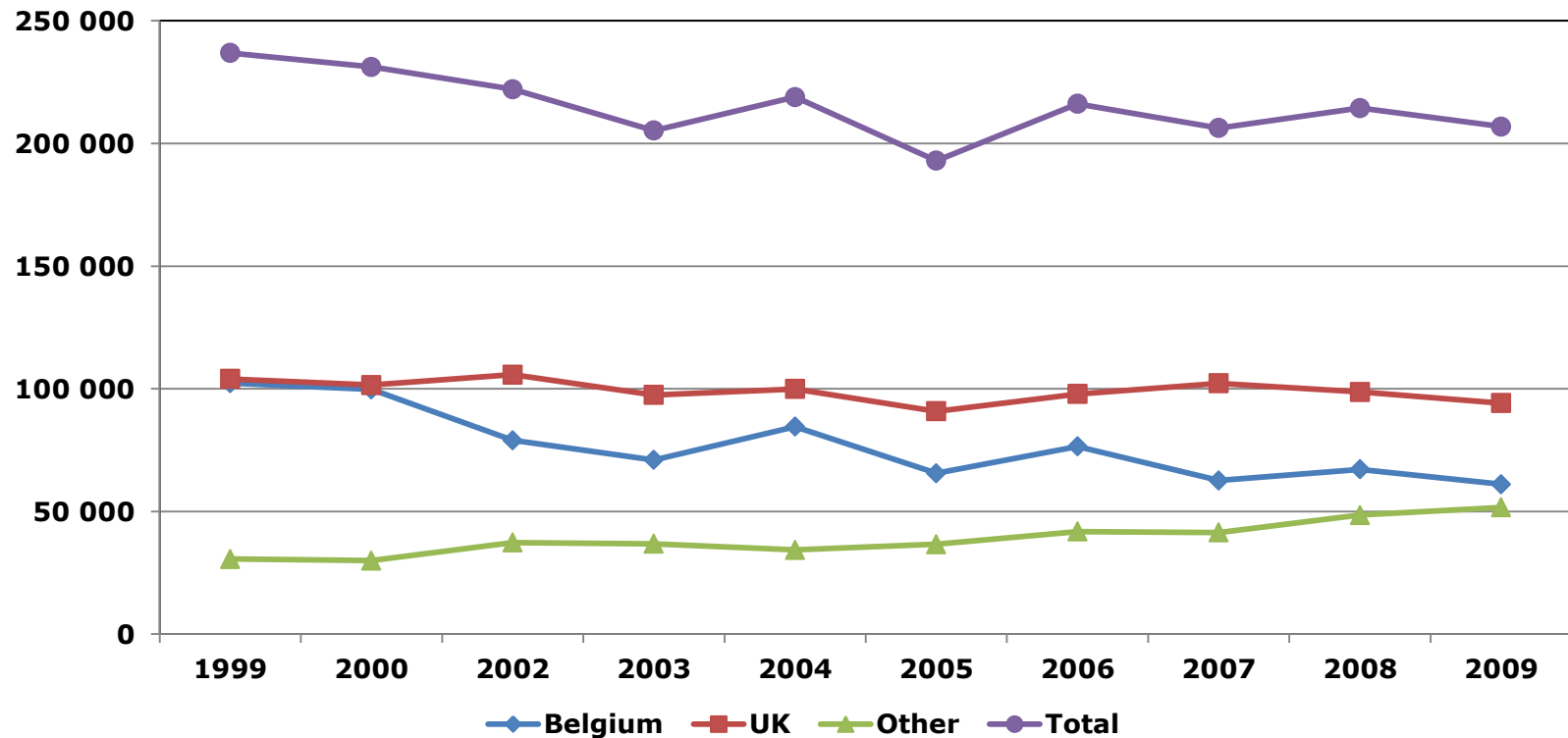
➤ Trend report 1999-2009

- General trends in target groups: important for marketing

Monitoring WWI related visitors

In Flanders Fields Museum

Visitor numbers by country of origin



Monitoring WWI related visitors

2002

Launching of the provincial network 'War & Peace in Flanders Fields' and growing interest in visitors at the cemeteries

- Pilot survey at **Tyne Cot Cemetery** (Zonnebeke)
 - First people counter with infrared sensor at the entrance
 - Face-to-face visitor survey

- Outcome
 - Visitor volume at the cemetery and distribution over the year
 - Demand of visitors for
 - more interpretation near the site
 - more references to other sites
 - more parking area especially for coaches

- Resulted in 2006
 - the building of a visitor centre adjacent to the cemetery
 - the extension of the parking area

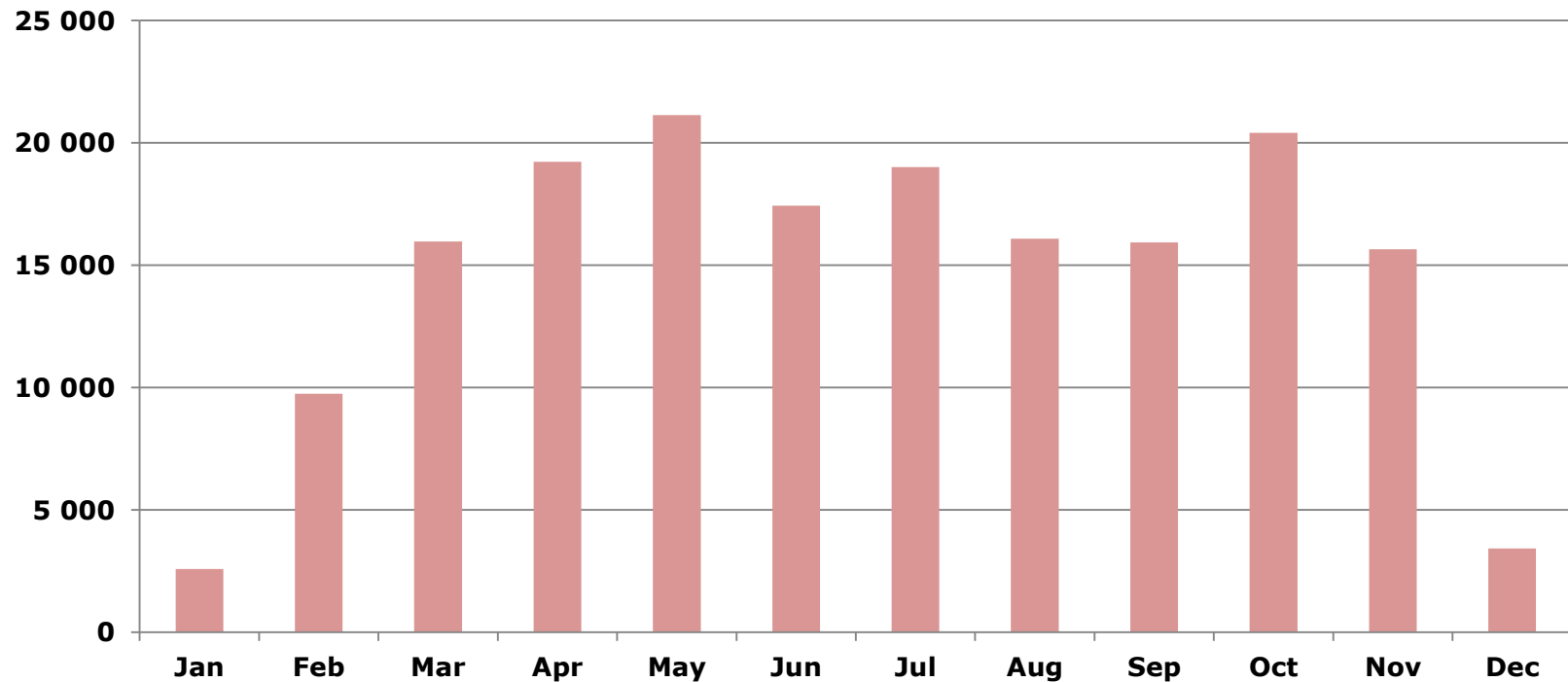


Monitoring WWI related visitors

Tyne Cot study (2002)

For the first time information about distribution of visitor numbers over the year

Visitor numbers: 200 000



Monitoring WWI related visitors

2006: Provincial network getting stronger

- Need to understand the WWI related visitors for the region as a whole
- Development of a methodology to estimate the volume of WWI related visitors
 - Extending the people counters to the 4 major cemeteries
 - Visitor survey at 10 WWI sites : 4 cemeteries and 6 museums
 - Developing parameters for estimation of the volume and economic impact also for the following years
- Understanding the WWI related visitors
 - Profiles and motivation
 - Behaviour
 - Expectations
 - Degree of appreciation and suggestions for improvement for the network but also for the individual sites



Methodology for estimating the visitors volume

Step 1

Summation of **all visits** at the 10 major sites in 2006

LOCATION	TYPE	NUMBER OF VISITORS	%
Tyne Cot Cemetery Zonnebeke	Cemetery	228 027	24.8
In Flanders Fields Museum Ieper	Museum	216 131	23.5
German Cemetery Langemark	Cemetery	144 655	15.7
IJzer Tower Diksmuide	Museum	78 587	8.5
Trench of Death Diksmuide	Museum	71 625	7.8
German Cemetery Vladslo	Cemetery	52 359	5.7
Memorial Museum Passchendaele 1917	Museum	44 004	4.8
Bayernwald Heuvelland	Museum	31 058	3.4
Lijssenthoek Cemetery Poperinge	Cemetery	29 509	3.2
Talbot House Poperinge	Museum	23 644	2.6
Total		919 600	100.0

Ticketing data from the 6 museums

Data from the people counters at the 4 cemeteries

Methodology for estimating the visitors volume

Step 2

Calculation of **average number of visits per visitor** to the 10 sites

'Which of these 10 sites did you visit?'

Weighted mean 2006: **2.8 visits** per visitor (for all visitors)

Step 3

Estimation of **the volume WWI related visitors** in 2006

Total volume of visits / average number of visits

919 600 / 2.8 = **some 330 000 WWI related visitors**

'**WWI related visitor**' is a very broad definition

'Those who visited at least one of the 10 selected WWI sites in the region'

On average WWI related visitors visit **5.5 WWI sites.**
(the 10 selected sites included)

Methodology for estimating the economic impact

Step 4

Calculating the economic impact 2006

'How important was the WWI heritage in your decision to choose the Flanders Fields region as a destination?'

	%	Assignment of expenditures
INDIVIDUALS		
<i>Only reason</i>	41.4	100%
<i>One of the reasons</i>	42.9	75%
<i>Not so important</i>	15.7	25%
ADULT GROUPS		
<i>Only reason</i>	34.1	100%
<i>One of the reasons</i>	50.5	75%
<i>Not so important</i>	15.4	25%

➤ Return generated by WWI related visitors

Day visitors 5.1 million euro
Overnight visitors 26.1 million euro

Total 31.2 million euro

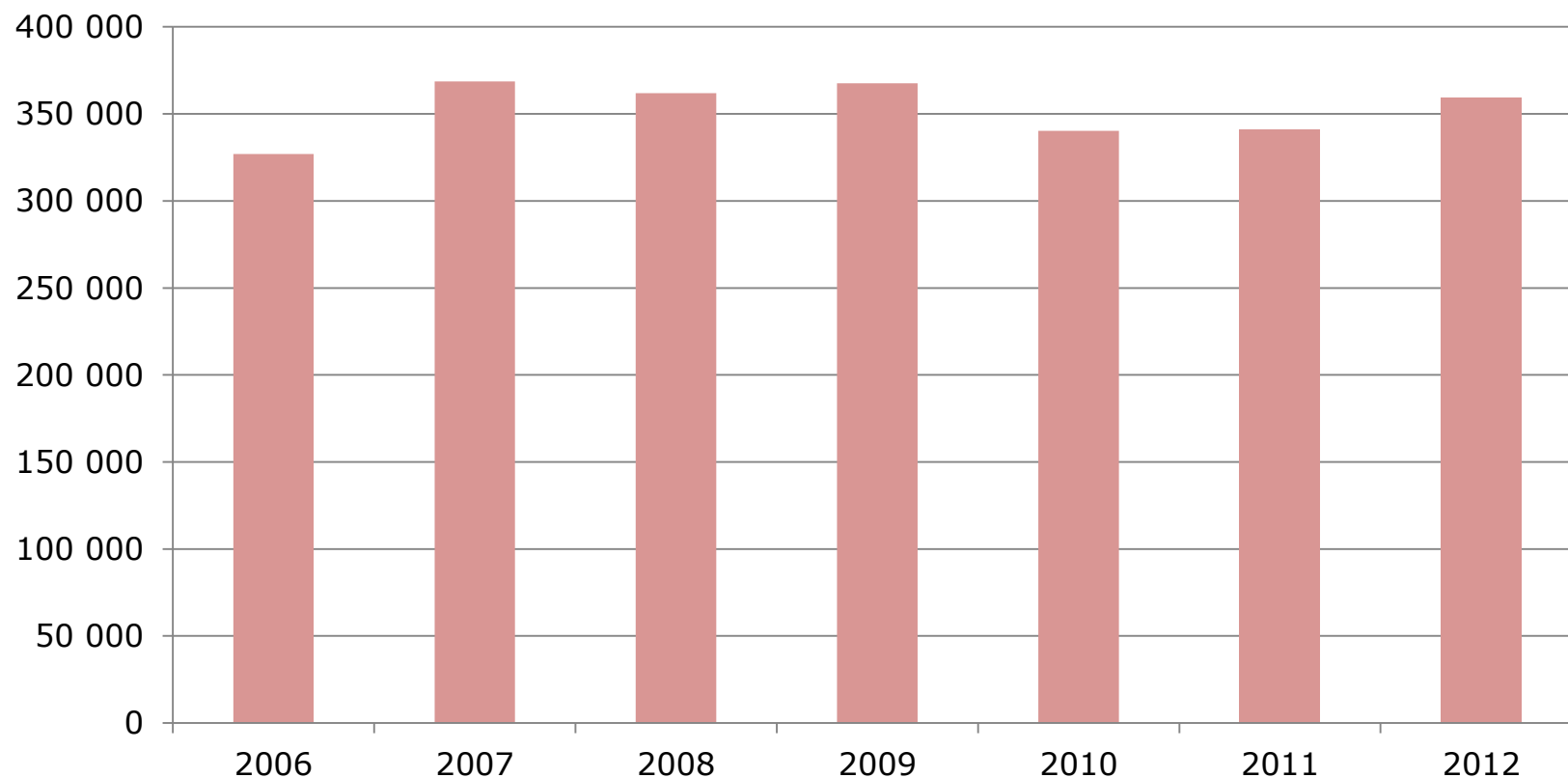
= 30% of total return generated by tourism in the region

Methodology for estimating the visitors volume

Step 5

Estimation of the **volume of WWI related visitors in the years after the survey**

Total visitor volume in the following years / **2.8**



Some results from survey 2006

➤ Profile and behaviour

- Less than 40% of the visitors spend the night, 60% are day visitors
- Average length of overnight stay in the region is 2.6 nights
- Belgians: more individual visitors and day visitors
- British visitors: mostly overnight visitors, more adult and school groups

➤ Motivation for visiting WWI related sites

- Specific interest in WWI is the main reason
- Family connection not so important any more, even for British visitors

Some results from survey 2006

Appreciation: score 4.1 on 5

Most satisfied	Less satisfied
Tidiness	Availability of rest seating
Educational value	Toilet and parking facilities
Friendliness of inhabitants	References to other WWI sites



Monitoring WWI related visitors

2012: Centenary 2014-2018 in view

Lots of investments and planning of events also in the North of France

- Need for measuring the impact of the centenary becomes a topic
 - Not only in **the Flanders Fields region**
 - But also in the **North of France**

- Survey within the **European Project 'Great War', Interreg Two Seas**
Partners in the research project:
Departments Nord, Pas-de-Calais, Somme and Westtoer
 - 0-measurement of volume and of economic impact in 2013 to enable comparisons during the following years of the centenary
 - November 2012 - October 2013: survey is still running
 - Using the same methodology as in 2006
 - Also survey with outgoing and incoming tour operators

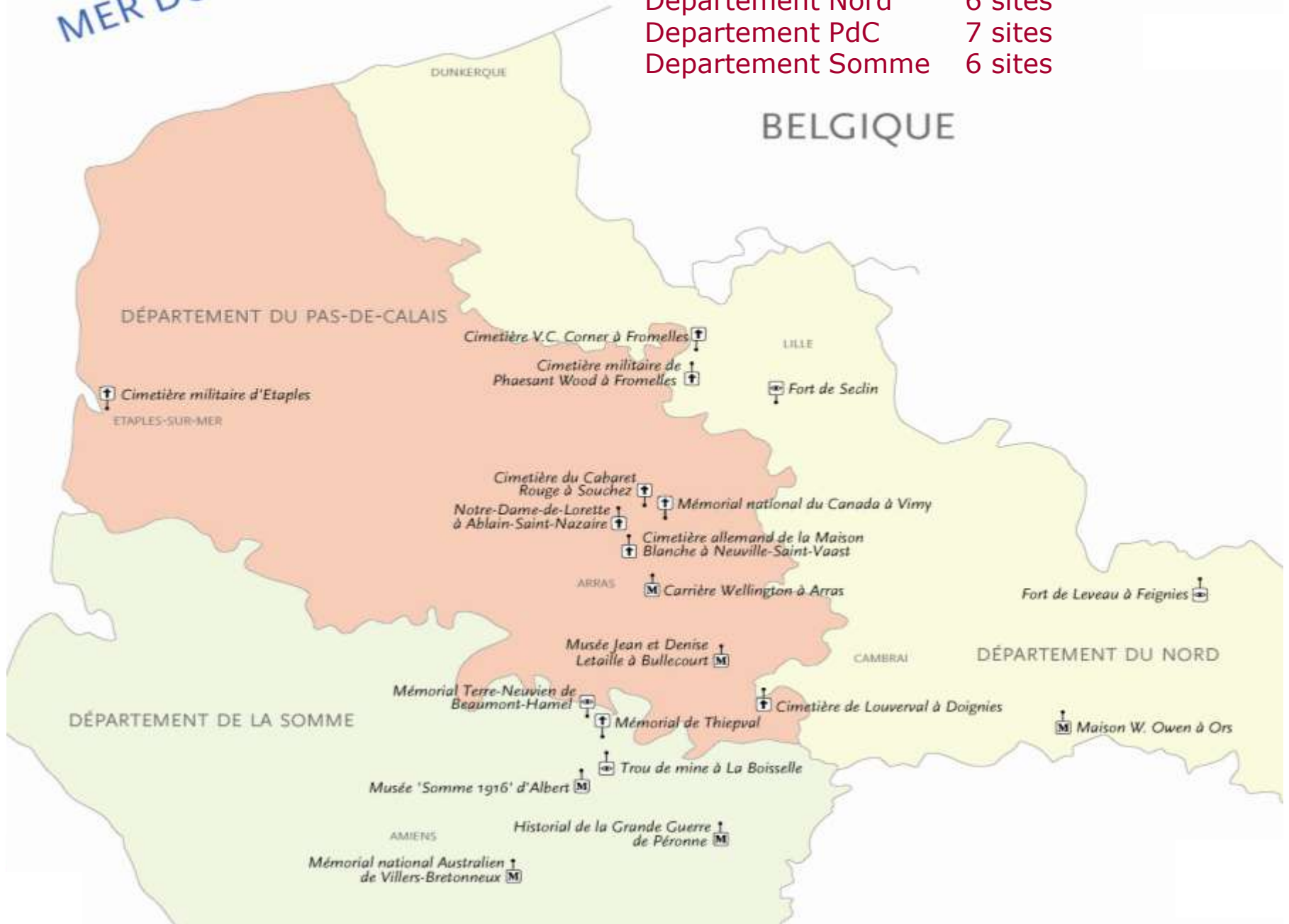
10 sites in the Flanders Fields region



MER DU NORD

19 sites in the North of France

Departement Nord	6 sites
Departement PdC	7 sites
Departement Somme	6 sites

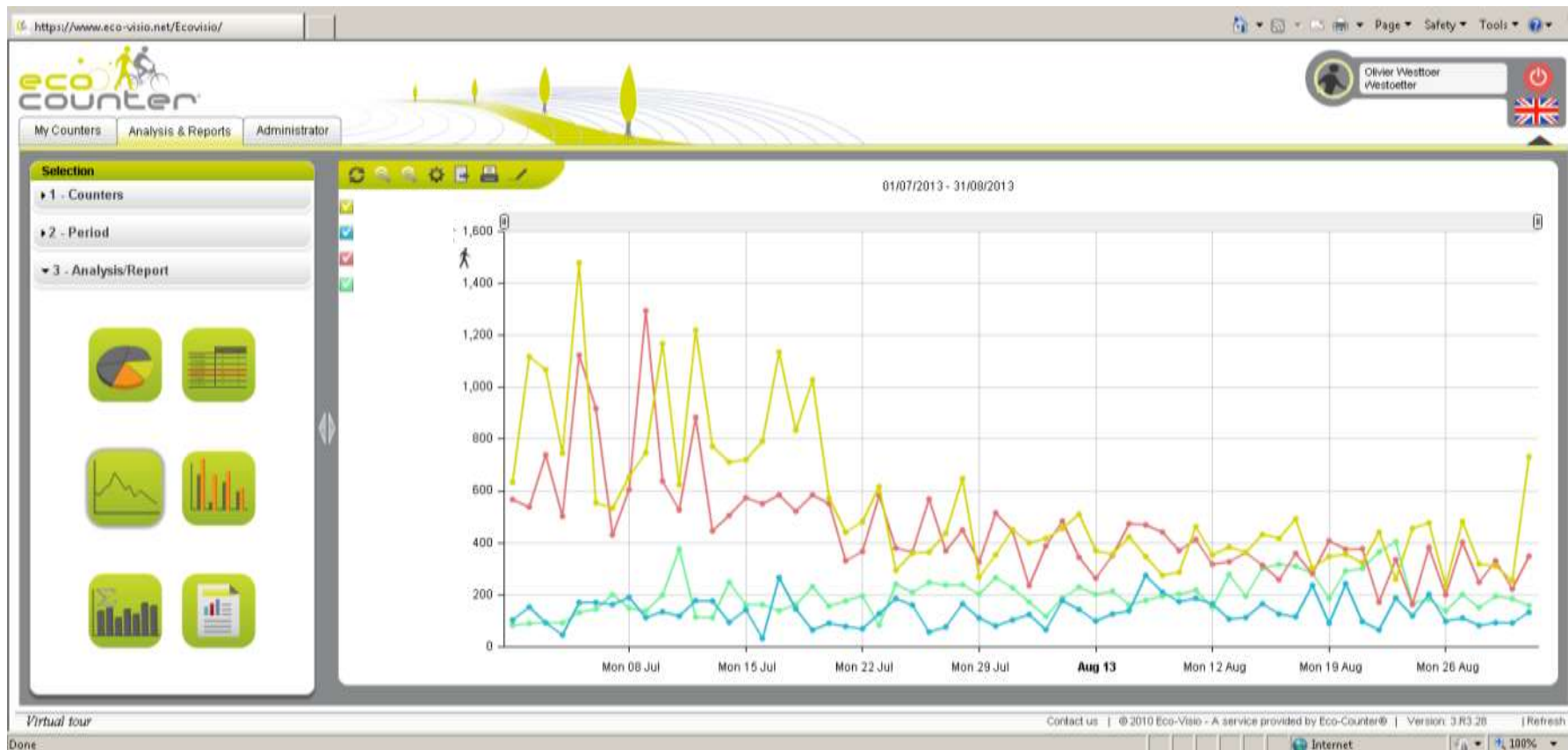


New people counters for continuous monitoring



Information by people counters

Data **per day** and **per hour** transferred online



Preliminary results from survey 2013

'Which of the 10 sites did you visit?'

	NUMBER OF SITES
INDIVIDUAL VISITORS	
<i>Belgian</i>	2.6
<i>British</i>	3.1
ADULT GROUPS	
<i>Belgian</i>	2.1
<i>British</i>	3.8
SCHOOL VISITORS	
<i>Belgian</i>	2.8
<i>British</i>	3.4

Those visiting **only one of the 10 sites** and **not any other site**:

Individuals	14 %
Adult groups	8 %



Preliminary results from survey 2013

'How important was the WWI heritage in your decision to choose the Flanders Fields region as a destination?'

	2006 (in %)	2013 (in %) (preliminary results)
INDIVIDUALS		
<i>Only reason</i>	41.4	45.7
<i>One of the reasons</i>	42.9	38.4
<i>Not so important</i>	15.7	15.9
ADULT GROUPS		
<i>Only reason</i>	34.1	51.6
<i>One of the reasons</i>	50.5	31.3
<i>Not so important</i>	15.4	17.2

Preliminary results from survey 2013

How does the region deal with its WWI heritage? (in %)

Respect and serenity at the sites	Totally agree	Inclined to agree	Inclined to disagree	Totally disagree	No opinion	Total
Individual visitors	84.9	14.4	0.6	0.1	0.0	100.0
Adult groups	80.7	18.3	0.0	0.0	0.9	100.0
School visitors	84.6	14.5	0.2	0.2	0.4	100.0

Message of peace	Totally agree	Inclined to agree	Inclined to disagree	Totally disagree	No opinion	Total
Individual visitors	70.4	27.2	1.8	0.2	0.4	100.0
Adult groups	60.6	35.8	1.8	0.0	1.8	100.0
School visitors	67.2	30.3	0.8	0.6	1.0	100.0

References to other WWI sites in region	Totally agree	Inclined to agree	Inclined to disagree	Totally disagree	No opinion	Total
Individual visitors	58.7	35.0	5.2	0.7	0.3	100.0
Adult groups	49.1	38.1	7.8	0.0	5.0	100.0
School visitors	50.8	39.2	7.5	0.6	1.9	100.0

Conclusion

Visitor monitoring

is a basic tool for professional visitor management of Memorial Tourism

- Respect for **the visitors**
Understanding the expectations related to the quality of the remembrance experience but also to supporting tourist facilities
- Respect for **the sites**
Understanding the need for proper supporting infrastructure to keep serenity at the sites (visitor centres, parking area, sanitary facilities)
- Respect for **the inhabitants of the region**
Understanding the mobility problems generated by visitors in order to spread visitors in time and space
Understanding the benefits for the inhabitants of the region

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