

Dadansoddi ar gyfer Polisi



Analysis for Policy



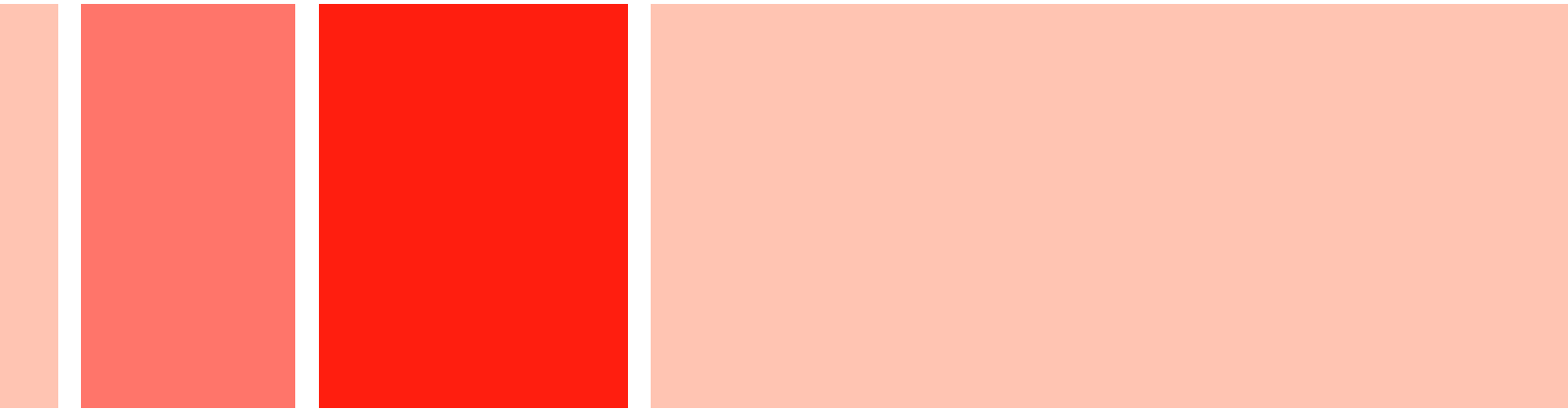
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The Economic Impact of Tourist Information Centres in Wales November, 2012



TIC Economic Impact Survey, 2012
Research on behalf of the Welsh Government

Claire Peate, Beaufort Research Ltd.

The logo for Beaufort Research, featuring the text "beaufortresearch" in a white, lowercase, sans-serif font, centered within a solid purple rectangular background.

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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Welsh Government Social Research

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Questionnaire – primary research with TIC users

Questionnaire – research amongst TIC managing agents

1. EXECUTIVE SUMMARY

Research Aim

The Welsh Government commissioned Beaufort Research in association with Houston Economic Consulting to identify and value the additional economic activity occurring at a given time in a local economy as the result of Tourist Information Centres (TICs).

Research Methodology

The work had two stages, the first stage involved engaging with a representative sample of TIC users across Wales to calculate the value of the TIC input during their trip. The second stage involved desk research/ economic impact modelling: applying TIC user valuations to the universe of TIC users across Wales to calculate the overall value of TIC user impact in 2012 by using visitor figures from 2011.

Main Findings

Profile of TIC users (primary research)

- **Local users account for a fifth of TIC customers** rising to over two fifths at TICs in South East Wales.
- **TICs attract an older profile of visitor to Wales** with 58% in the 55+ age group. Just 2% of TIC users were under the age of 24 and 7% were between the ages of 25 and 34.
- **Families with children are in the minority** amongst TIC users with nearly seven in ten TIC users on a trip *without* children.

TIC usage (primary research)

- **Attractions are the most-mentioned area of information** followed by local facilities and events.
- **Conversion is high** with nearly three quarters of those obtaining information on *places to eat and drink* and *attractions* going on to visit.
- **For approximately a quarter of TIC users** they would “definitely not” have visited/ booked the attraction/ accommodation/ event etc if it were not for the TIC information.

- **Future benefit:** for over half of all TIC users the information they received will *definitely* encourage them to make a future trip.
- **One third would not be prepared to pay for the TIC service** and a further 38% were not able to put a value on the service they received.

Welsh Economic impact

- Gross additional spend associated with a TIC enquiry is £17.49
- Net additional spend is £5.22 per enquiry
- 1,622 gross FTE jobs are associated with TICs – 92% are through visitor spend
- 605 net additional FTE jobs are supported through TICs – 73% are through visitor spend
- 605 net additional FTE jobs generate £16.5 million Gross Value Added.

2. INTRODUCTION AND OBJECTIVES

The Welsh Government commissioned Beaufort Research in association with Houston Economic Consulting to conduct a research study amongst TIC users in Wales during August and September 2012.

The overall aim of the study was:

To identify and value the additional economic activity occurring at a given time in a local economy as the result of the Tourist Information Centres

Specific objectives were:

- To estimate the gross impacts of the TICs, for example the number of jobs created or safeguarded or the additional turnover generated through – for example – additional room bookings, additional attendance at events or additional marketing activity.
- To determine whether the TICs motivate repeat visits and recommendations
- To estimate how much of these benefits would happen without the provision of TICs
- To determine whether there are any displacement effects, for example where the visitor switches expenditure from one local business to another as a result of the TIC
- To determine if any additional benefits will occur through purchases along supply chains, employee spending rounds and longer term effects as a result of the TICs.

3. METHODOLOGY

The Tourist Information Network in Wales encompasses all forms of information delivery. Tourist Information Centres (TICs) are one element of the Tourist Information Network and this term relates to manned centres only. All forms of unmanned information provision are defined as Alternative Outlets.

There are currently 56 TIC's in Wales, managed by 29 different Managing Authorities (funding bodies that include National Park Authorities and Local Authorities). Forty-seven TIC's are open throughout the year, of these, four have limited opening. Ten TIC's open on a seasonal basis. In 2011, these centres dealt with just over 3.3million enquiries. A list of the TIC's in Wales can be found at:

<http://www.visitwales.co.uk/contact-visit-wales/tic's-tourist-information-centres/>

Those TICs that took part in the survey are listed on page 7 of this report.

The project was multi-staged as follows:

STAGE ONE Primary Research: engaging with a representative sample of users of TICs in Wales to calculate the value of the TIC input during their trip.

STAGE TWO Desk research/ economic impact modelling: applying TIC user valuations from stage one to the universe of TIC users across Wales to calculate the overall value of TIC user impact in 2012. Applying average TIC operational goods and services spend to total TICs to calculate overall value of TIC operational impact.

The methodological approach to both stages will be covered separately below, with the approach to economic modelling fully explained.

STAGE ONE – PRIMARY RESEARCH

The research universe for the survey was defined as those who had been in touch with a TIC based in Wales (or on the Welsh borders in England at a TIC which has a close association with Wales). Users of the TIC were defined as:

- Face to face visitors i.e. those using the TIC in person
- Telephone enquirers
- Email enquirers

TIC users were from Wales, the rest of the UK and abroad.

The most appropriate research approach was to contact the three groups of TIC users via the telephone. To generate the sample with which to conduct the interviews the TIC network was asked to gather names and telephone numbers of enquirers.

A total of 1,115 usable names and telephone numbers were generated in this way from those who contacted a TIC between 6th August and 16th September. Interviewing took place between 15th August and 23rd September 2012

A total of 600 interviews were achieved with disproportionate quotas set to achieve as equal a split between the four regions as follows. Given the smaller samples available to us a strict ¼ split in the sample was not possible, with the end figures as follows:

North Wales: 181 interviews

South West Wales: 129 interviews

South East Wales: 124 interviews

Mid Wales: 166 interviews

The questionnaire used is included in the Appendix.

These figures were weighted back to reflect the universe of TIC enquirers based on 2011 data provided by the client.

The following lists the 56 TICs that formed the 2011 TIC network baseline for the purposes of the economic impact assessment¹. Those in italics submitted sample for the visitor survey.

The TICs of Wales (and borders) are as follows – those in *italics* submitted sample for the survey.

North Wales	Mid Wales	South East Wales	South West Wales
<i>Aberdyfi</i>	<i>Aberaeron</i>	<i>Abergavenny</i>	<i>Aberdulais</i>
<i>Anglesey</i>	<i>Aberystwyth</i>	<i>Barry Island</i>	<i>Carmarthen</i>
<i>Betws y Coed</i>	<i>Borth</i>	<i>Caerleon</i>	<i>Fishguard Harbour</i>
<i>Bala</i>	<i>Brecon</i>	<i>Blaenavon</i>	<i>Fishguard Town</i>
<i>Barmouth</i>	<i>Cardigan</i>	<i>Caerphilly</i>	<i>Haverfordwest</i>
<i>Beddgelert</i>		<i>Cardiff</i>	<i>Llandovery</i>
<i>Caernarfon</i>	<i>Knighton</i>	<i>Cardiff Bay</i>	<i>Llanelli</i>
<i>Conwy</i>	<i>New Quay</i>	<i>Chepstow</i>	<i>Milford Haven</i>
<i>Dolgellau</i>	<i>Oswestry Mile End</i>		<i>Newport (Pembs)</i>
<i>Harlech</i>	<i>Oswestry Town</i>	<i>Merthyr Tydfil</i>	<i>Pembroke</i>
<i>Llandudno</i>	<i>Presteigne</i>	<i>Newport</i>	<i>Saundersfoot</i>
<i>Llangollen</i>	<i>Welshpool</i>	<i>Porthcawl</i>	<i>St Davids</i>
<i>Llanberis</i>		<i>Bridgend</i>	<i>Swansea</i>
<i>Mold</i>			<i>Tenby</i>
<i>Porthmadog</i>			<i>Mumbles</i>
<i>Pwllheli</i>			
<i>Rhyl</i>			
<i>Wrexham</i>			

The above shows that there was a good response from the TIC network – covering the regions as well as different sized businesses.

¹ Crickhowell and Elan Valley TICs joined the TIC network in 2012. Elan Valley also contributed some visitor contact details for the visitor survey. Bridgend TIC left the Network in 2012.

STAGE TWO – DESK RESEARCH/ ECONOMIC IMPACT MODELLING

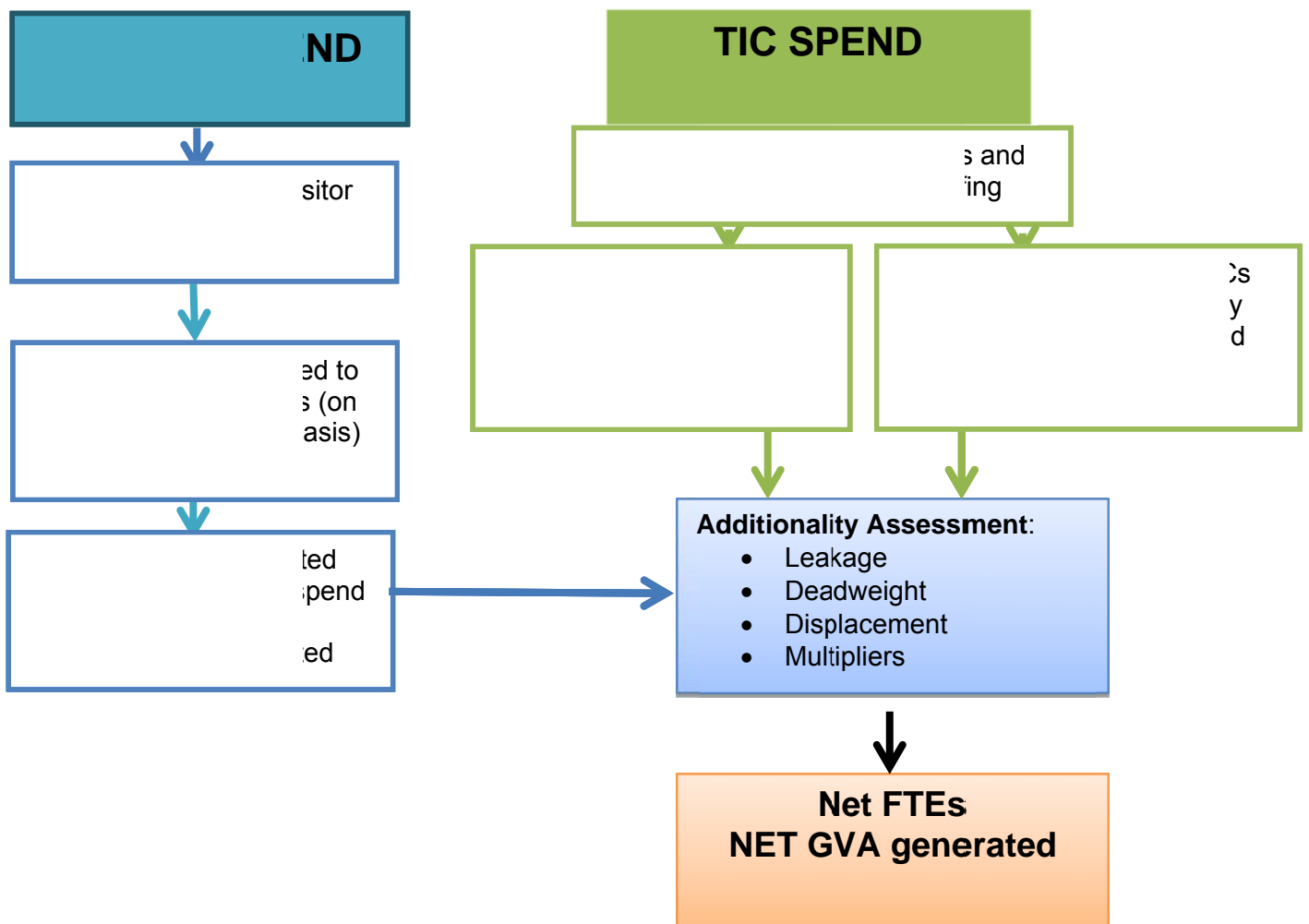
The approach to calculating economic impact is based on the economic impact assessment of:

1. the additional spend that TIC users make as a result of the information and advice they receive from the TIC
2. the activities of the TICs in terms of direct and indirect employment and their spend on goods and services in the local economy

The inputs for both (1) and (2) above have come from primary survey work:

1. from telephone surveys of TIC users (see previous section); which is then grossed up using the recorded enquiries at TICs in Wales
2. from questionnaires circulated to the managing agents of all TICs in Wales (see Appendix)

The method is summarised in the following diagram.



The primary area of benefit used for the economic analysis is the local area, as defined by TIC users in the survey and the TIC managers for the respective parts of the study.

We have used the following terminology

- Direct impacts – these are the impacts that relate to the direct employment of TIC staff.
- Indirect impacts – these are the impacts through the local supply chain purchases by the TICs as well as spending on goods and services by TIC staff.
- Net additional – this refers to the impacts adjusted to take account of:
 - leakage (i.e. benefits that accrue outside the local areas around the TICs);
 - displacement and substitution (i.e. impacts that result from reduced economic outcomes elsewhere in the local area);
 - deadweight (i.e. impacts that would have occurred anyway); and
 - multipliers (coefficients used to estimate the subsequent rounds of impacts on the economy resulting from the direct and indirect impacts).

The method for calculating economic impact broadly uses three sets of indicators:

- visitor spend/TIC spend in the wider economy
- full time equivalent jobs supported by the visitor spend or TIC spend
- gross value added (GVA) per employee

Each of these is summarised below, with the assumptions on figures or benchmarks being used.

Visitor/TIC Spend

The survey of users of TIC provides primary data on the additional spend of visitors as a result of information received at the TIC, broken down by category of spend (e.g. accommodation, eating out). Obtaining visitor spend information is the intermediate

indicator needed, from which full time equivalent jobs created by the visitor spend can be estimated. We have excluded the spend by local resident users of TICs as this is not an additional input into the local economy.

Similarly, spend by TICs provides the important intermediate data from which full time equivalent jobs created by that spend can be calculated. Data from Managing Agents has covered 28 of the 56 TICs in Wales. Average spend figures per TIC have been derived from this and applied to those TICs for which no returns were received.

FTE jobs

Full time equivalent jobs are derived from visitor spend and TIC spend figures. The economic impact assessment uses an average visitor spend per FTE job calculated from the Wales Tourism Impact Model for 2007². This figure is applied to the additional visitor spend arising from information/advice received at the TICs, to give an assessment of additional FTE jobs created.

TIC staff employment has been obtained from Managing Agents responding to their questionnaire. Hours and weeks worked by staff are converted into FTEs and the average number of FTEs per TIC figure is applied to those TICs where responses from Managing Agents have not been received.

TICs purchase a variety of goods and services to support their operation. An average turnover per job figure has been applied to TIC spend (excluding staff costs) in order to calculate FTE jobs supported as a result of the operational spend of TICs. This figure is derived from Stats Wales data for employment and turnover by sector in 2011 and the latest data available for the 'wholesale, retail, transport, hotels, restaurants and communications' sector grouping as a proxy for the tourism industry.

² This is the latest available model.

Gross Value Added

Gross Value Added (GVA) is a measure of the value of [goods](#) and [services](#) produced in an area, industry or sector of an [economy](#).. This economic impact assessment uses a 'per employee' GVA figure taken from the Tourism Satellite Accounts (TSA) and Wales Input-Output Model and applies this to the number of FTE jobs calculated. This figure is applied to all FTEs generated from visitor spend and FTE staff employment at TICs.

The Wales Input-Output Model gives GVA/employee by industry categories. The economic assessment uses the category of 'wholesale, retail, transport, hotels and food' as a proxy for TIC spend on non-staff goods and services. GVA per employee for this category is applied to TIC operational spend on non-staff goods and services. In practice the goods and services span a number of different categories some of which are higher GVA per employee than others. GVA per job for retail is relatively low, therefore its use as a proxy should not over estimate the likely GVA.

Additionality

Additionality is taken into account by considering three issues:

- Leakage; the proportion of impacts that benefit people/the economy outside a target area. The economic impact assessment considers this in the context of Wales
- Deadweight; the proportion of outputs/outcomes that would have happened anyway. In the context of this assessment, this is taken to be the visitor spend and activity that would have happened anyway regardless of information received from the TICs
- Displacement; the proportion of outputs/outcomes that are reduced elsewhere in a target area. In the context of this economic impact assessment this is interpreted at the local level where visitor spend and activity may displace spend/activity that would have taken place in another local facility or service. Displacement is not specifically applied to the spend of TICs on their operational activities as it is assumed that expenditure of TICs would not be reapplied elsewhere by managing authorities

We have used the survey of visitors to TICs to generate the additionality coefficients used for estimating the net additional economic impact:

- Question 10c explores whether the TIC visitor would have undertaken various activities whether or not they received information from the TIC/made a booking through the TIC. We have used this to inform the estimates of deadweight.
- Questions 11, 17, 21, 24, 27 and 30 explore whether the activity was within the local area of the TIC or not. We have used these to inform the estimates of leakage.
- Questions 15, 19, 23, 26, 29 and 32 explore what the respondents would have done instead of the accommodation/activity they received information on from the TIC. We have used these to inform the estimates of displacement.

Multipliers

Multipliers are used in the economic impact assessment to identify indirect/induced spend and indirect/induced jobs (i.e. the further downstream effects of visitor and TIC spend through the supply chains and the further downstream effects on jobs by the spend of the FTE jobs created)

The Tourism Satellite Accounts 2007 use a multiplier for employment and this has been applied to this assessment. The Wales Input -Output Model uses an employment multiplier in the proxy sector of wholesale and retail which is applied in this assessment to TIC spend on non-staff goods and services.

To summarise, the references for the economic modelling are as follows:

Source	Use
TIC/Managing Agent information responses	<ul style="list-style-type: none"> • Employment • Spend on goods and services
TIC User Survey	<ul style="list-style-type: none"> • Visitor spend • Additionality
Wales Tourism Impact Model 2007	<ul style="list-style-type: none"> • Average visitor spend per FTE job
Stats Wales sector employment and turnover data 2011	<ul style="list-style-type: none"> • Average turnover per job
Tourism Satellite Accounts/Wales Input-Output Model	<ul style="list-style-type: none"> • Gross Value Added* per employee • Multipliers

4. MAIN FINDINGS

4.1 Profile of TIC users (primary research)

As no quotas were applied to the research in terms of where the visitor came from the results of the survey are broadly representative of the universe of TIC users. Across all TICs in Wales (and including two Welsh-border TICs) just over one in five (21%) classed themselves as 'local'³. This rose to over two in five (44%) at TICs in South East Wales (see Chart 1, below).

Chart 1

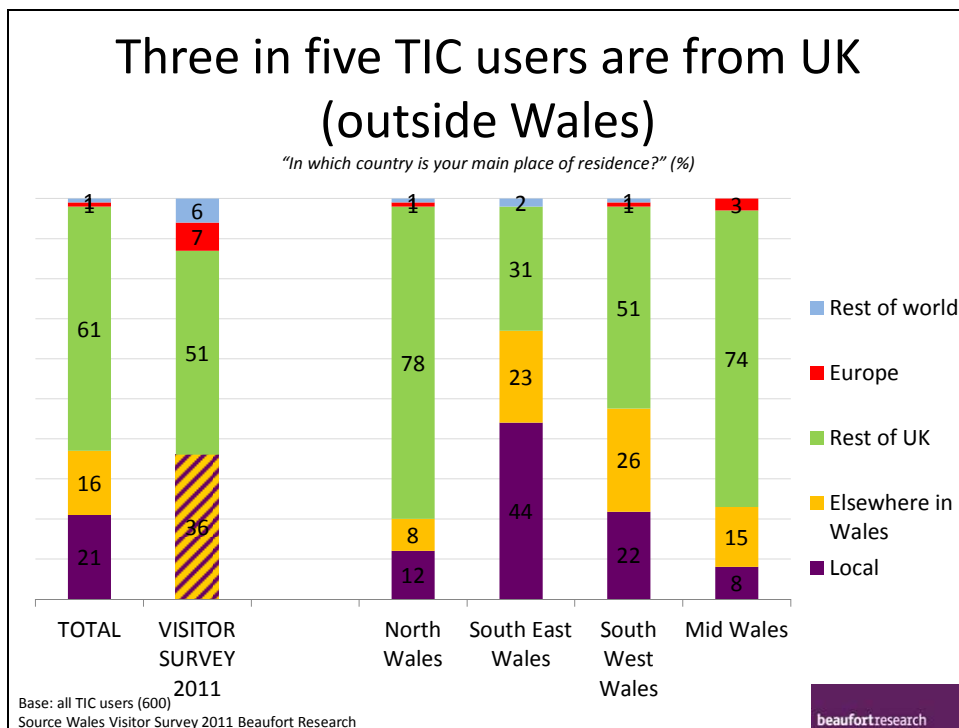


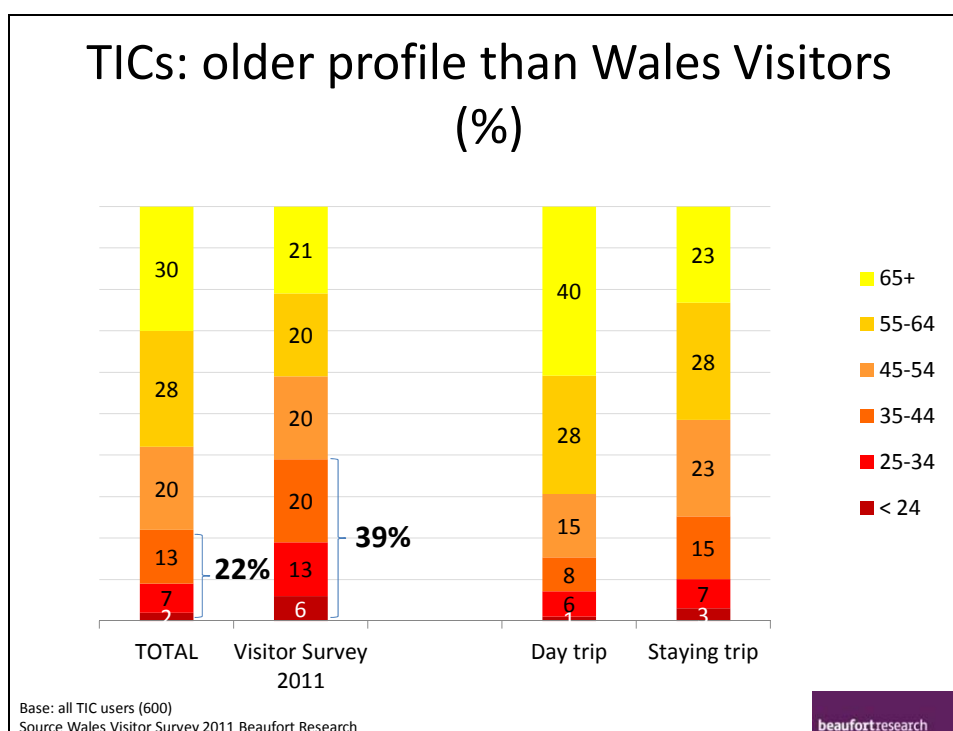
Chart 1 also shows the similarity between the profile of TIC users and the profile of those visiting Wales as a whole (Wales Visitor survey 2011). The increased proportion of overseas visitors in the Wales Visitor Survey is attributable to a boost to the sample amongst this segment.

³ The definition of "local" was left to the discretion of the respondent – be they TIC users (primary research) or managing authority (desk research/ economic modelling). This decision was taken as there exists no formal distance classification of "local".

It is important to draw attention to the fact that “local” visitors are excluded from the economic impact modelling later on in the report (Section 4.3), on the grounds that their expenditure is not additional to the local economy and that value figures are based on those from further afield as these form the basis of the TIC target market.

Looking at the profile of TIC users Chart 2, below, shows that there is a marked trend towards an older demographic with nearly three in five (58%) aged 55+. This compares to 41% across the profile of visitors to Wales.

Chart 2



Just 2% of the users of TIC’s across Wales were aged under 24 years, and a further 7% were aged 25-34.

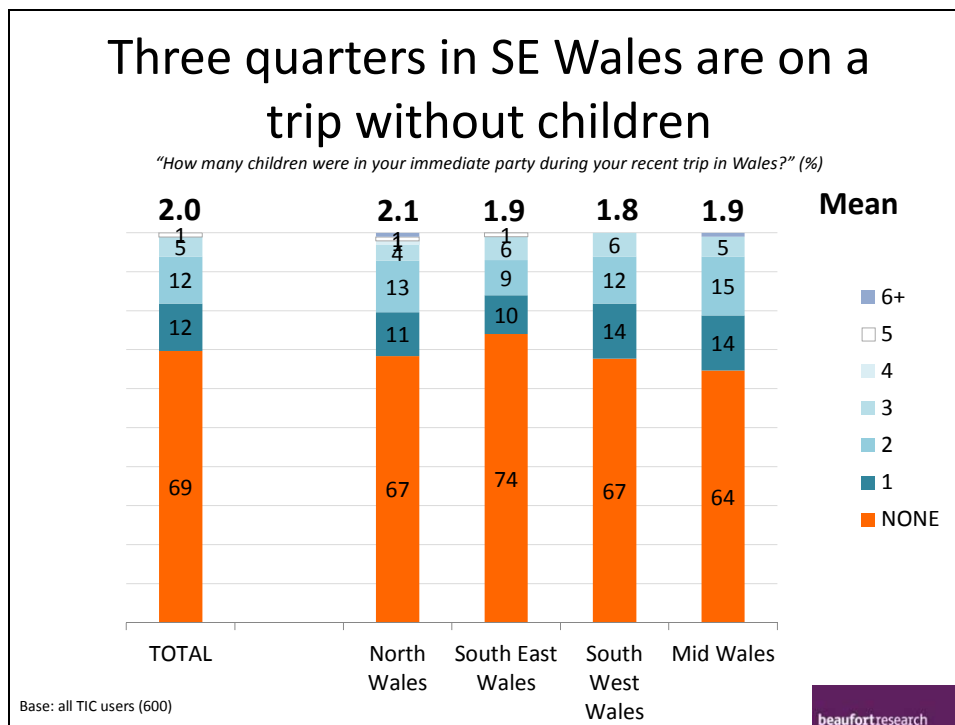
Looking regionally, South East Wales has the oldest profile of TIC users with 61% falling into the 55+ age group, compared to Mid Wales where 54% were aged 55+.

In total over a third (38%) of visitors to TICs classified themselves as *retired*: rising to 41% of all visitors to TICs in South East Wales. Retirees are in the greatest

proportions amongst 'local' visitors (54% are retired) while those from the rest of the UK are more likely to be in employment (29% are retired).

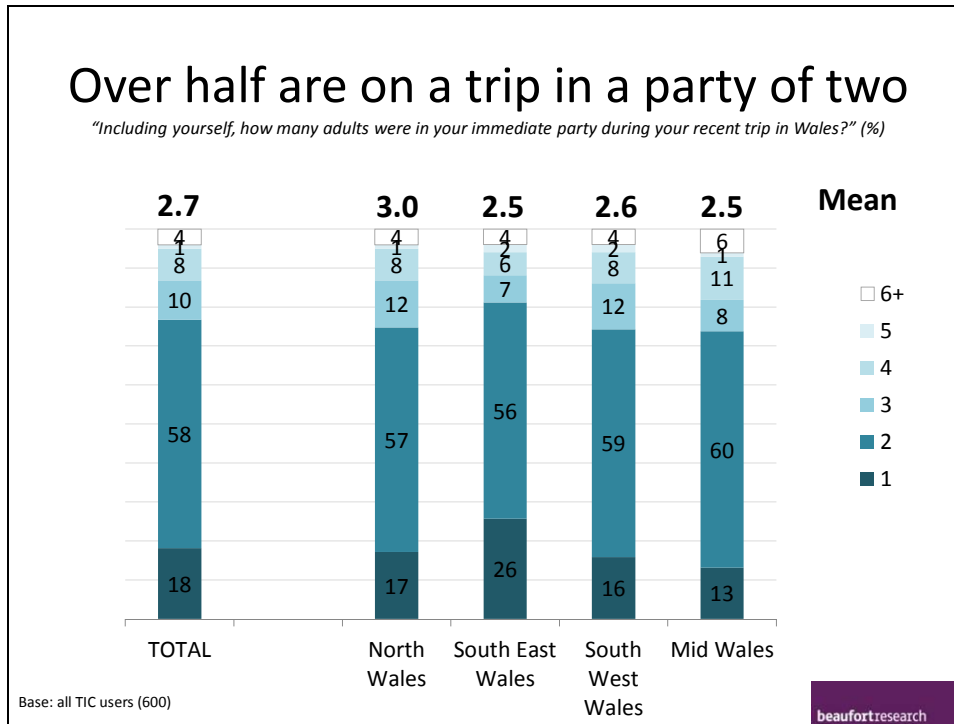
Connected to this aspect of TIC user profile the research also explored whether the TIC users were on a trip with children. Chart 3 shows that nearly seven in ten (69%) are on a trip in Wales without children: highest in South East Wales (74% were on a child-free trip in Wales). Perhaps a reflection of their age.

Chart 3



With such high proportions of child-free visitors it is perhaps not surprising that the average group-size for TIC users (including the respondent) is 2.7 (Chart 4, below) with overall 18% travelling alone and 58% on a trip with one other person.

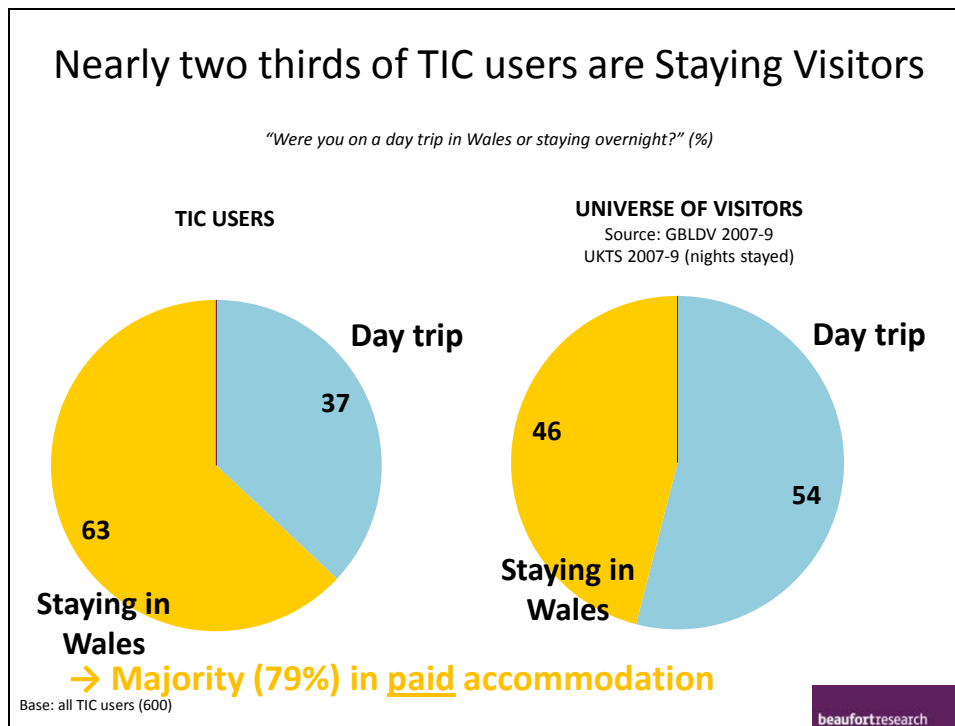
Chart 4



Interestingly 4% of TIC users are in a large party with six or more: slightly higher in Mid Wales (6% are in a party of six or more).

The research also looked at the proportion of visitors who were on a day trip or staying trip to Wales (NB staying overnight in Wales). The results in the following chart show that TIC users are skewed towards staying visitors: 63% of visitors are staying in Wales compared to 46% of all staying visitors to Wales.

Chart 5

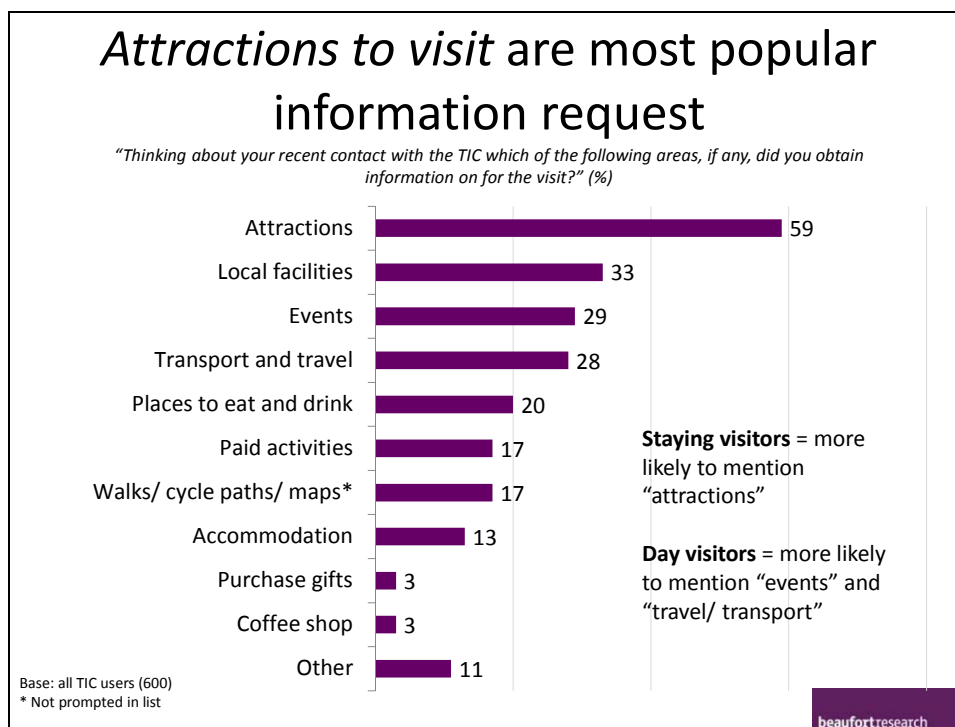


Amongst those who were on a trip that involved at least one overnight stay in Wales the majority (79%) were in paid accommodation – that is, they were not staying with friends or relatives or in their own accommodation.

4.2 TIC usage (primary research)

The most requested area of information amongst TIC users was *attractions* with nearly three in five (59%) requesting information on this area. This was followed by *local facilities* (which included leisure centres, shops, theatres, cinemas, libraries and local parks) with 33% mentioning this area.

Chart 6



The list of potential sources of information shown in Chart 6, above was given as a prompted list to the respondent (i.e. read out to them). However, respondents were able to add their own areas of information request and the most-mentioned of these was *walks/ cycle paths/ maps* with nearly one in five (17%) spontaneously mentioning this area. This proportion would have probably been higher had this been included in the original set of options.

Looking at information requests by age of TIC user:

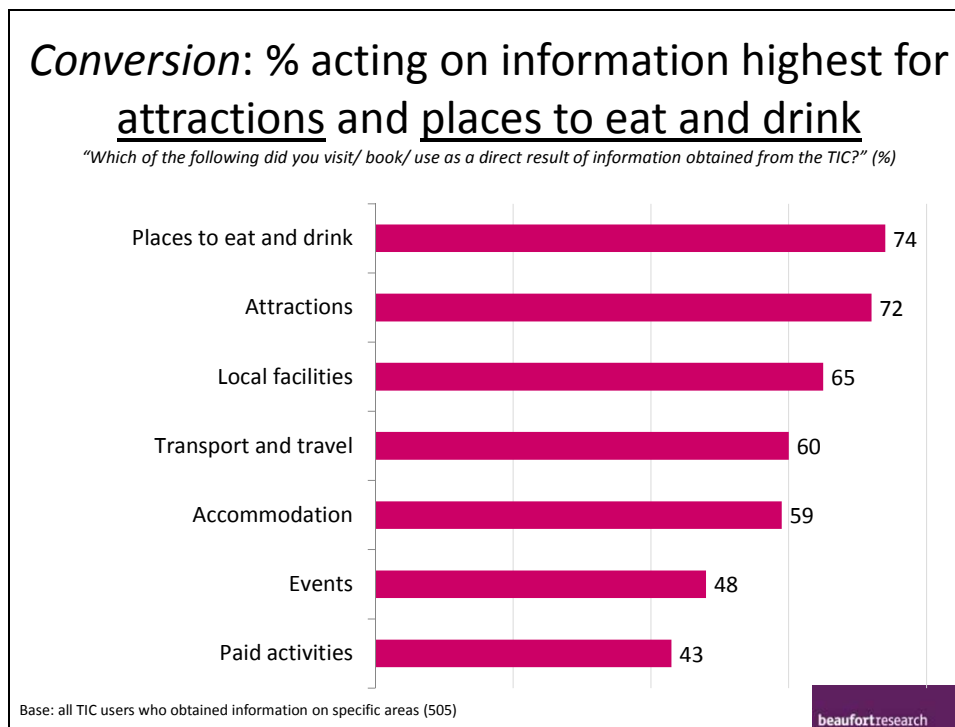
- Younger TIC users (those aged below 44) are much more likely to request information on *paid activities* – such as kayaking, horse riding etc. and *local facilities*.

- Older TIC users (those aged 65+) are more likely to request information on *travel and transport*.

Those on a day visit to Wales were much more likely to request information on *events* and *travel and transport* while those who were staying in Wales were more likely to request information on *attractions*.

After having requested information the survey asked whether the respondent had gone on to act on that information – whether they had visited/ booked/ used the facilities that had been suggested by the TIC. Chart 7 shows the proportion of ‘converters’ – that is, the proportion who went on to use the information that they were given by the TIC.

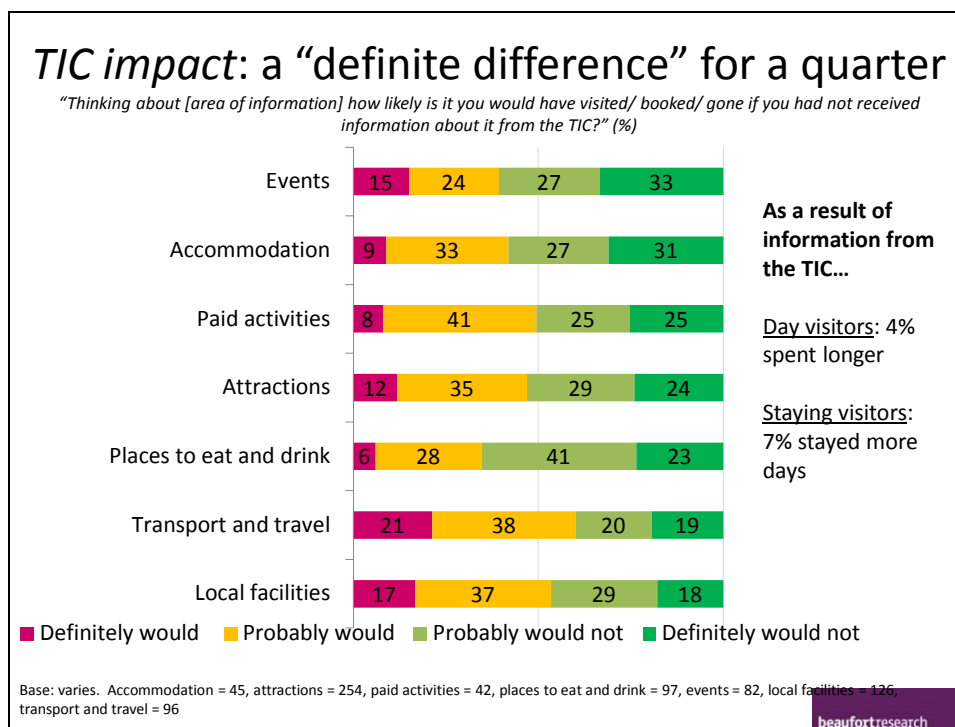
Chart 7



The area of information that achieved the highest conversion rate was *places to eat and drink* with nearly three quarters (74%) going on to visit a place that was suggested by the TIC. This was closely followed by *attractions* which were visited by 72% of those who enquired.

Even the lowest conversion rates remain very positive with just under half of all the requests for information on *events* and *paid activities* resulting in a visit/ booking. TIC users were also asked to what extent they believed the TIC made a difference to whether they would have visited/ booked and the results are given in the chart 8

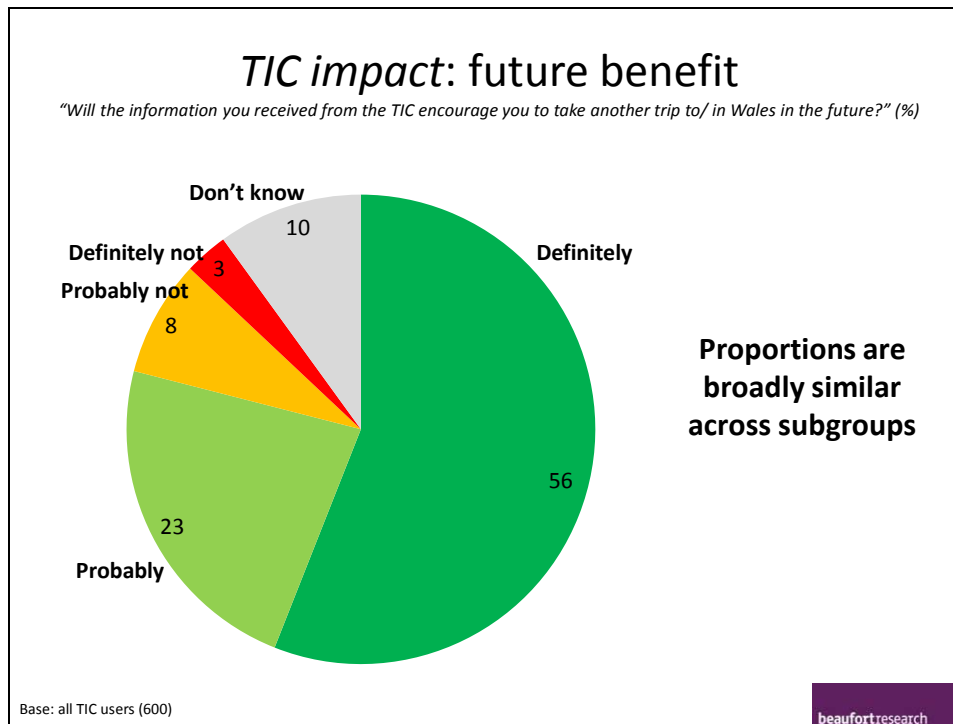
Chart 8



Approximately a quarter of TIC users believed that they would *definitely not* have visited the attraction/ event/ place to eat etc if they had not obtained information from the TIC. *Events* had the highest level of ‘difference’ with a third (33%) saying they would *definitely not* have visited an event if it had not been for the TIC’s involvement. This was closely followed by *accommodation* with just over three in ten (31%) saying they *definitely would not* have booked their accommodation if it had not been for the TIC.

One element that the primary research captured but was *not included* in the economic impact modelling calculations was *future benefit* of the information given, with the questionnaire asking whether the information the TIC user received encouraged the TIC user to take another trip to/ in Wales in the future. The results are shown in chart 9.

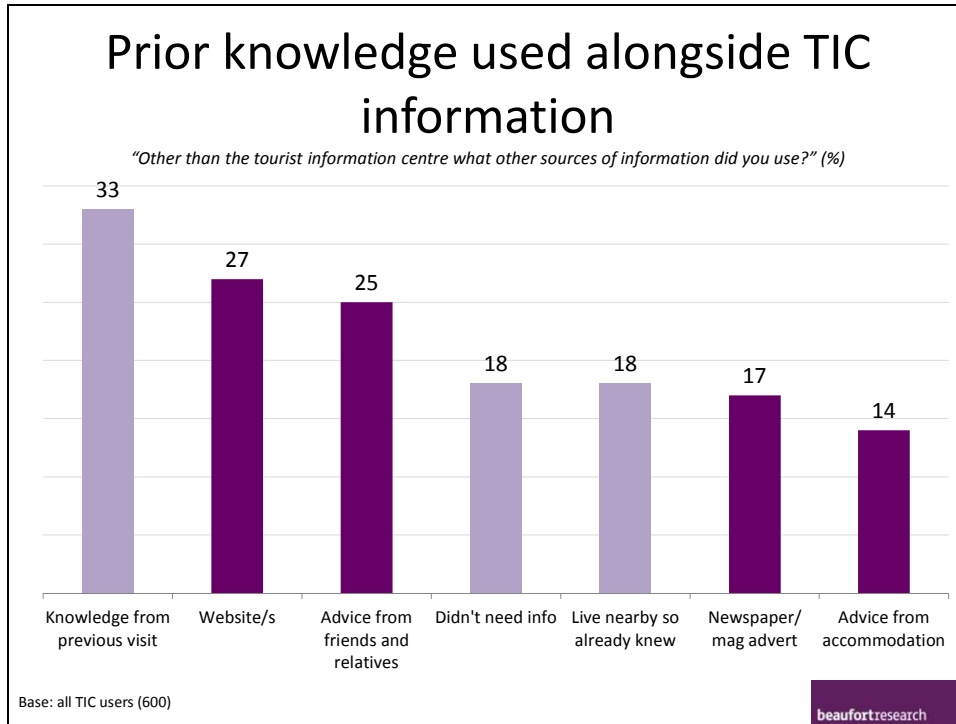
Chart 9



Over half (56%) said that the information *definitely* will encourage them to take another trip to/in Wales in the future – with a further 23% saying it will *probably* make a difference. This impact is in similar proportions across the various subgroups (such as TIC user age, gender, origin and region of TIC).

TIC information is used, for the most part, in conjunction with the user's prior knowledge of the region. A total of 33% of TIC users said they supplemented the information from the TIC with *prior knowledge from previous visit* and a further 18% said they *did not need information*. 18% said they *live nearby so already knew*.

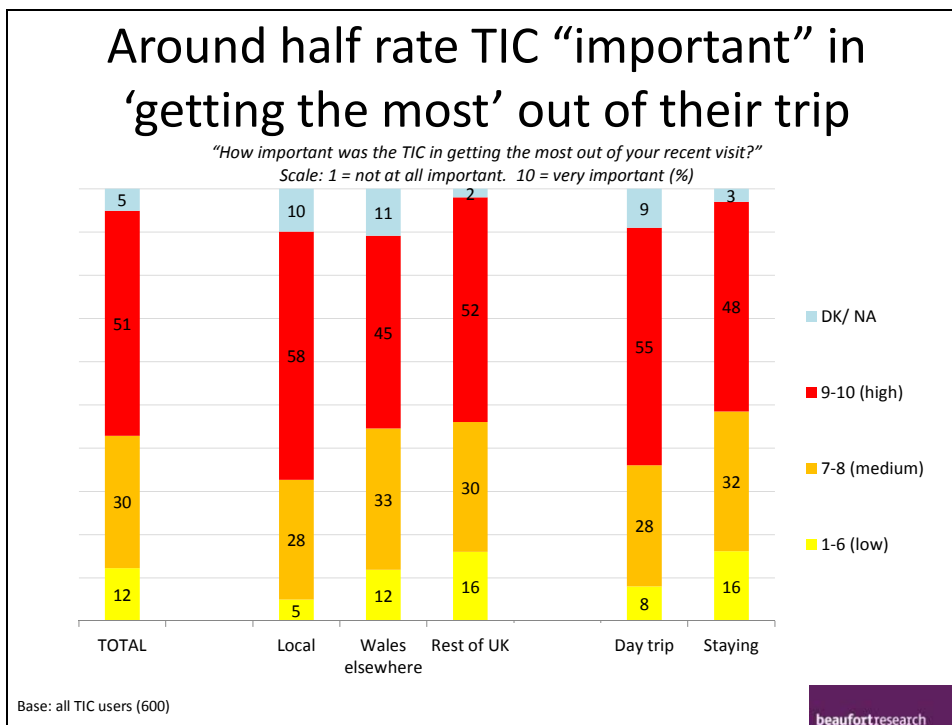
Chart 10



Where respondents did use other information, this was primarily *websites* (27% used a website) and *advice from friends and relatives* (25%).

In terms of *getting the most out of the trip* respondents were asked to rate the information from the TIC on a scale of 1 to 10, where 1 represents not at all important and 10 represents very important. The ratings were then given a grade according to importance, with ratings of 9 and 10 classified as “high” importance, 7 and 8 as “medium” and 1 to 6 as “low”. The results in chart 11 show that for just over half of all visitors to a TIC the information they received was rated “high” in their perception of getting the most out of their trip.

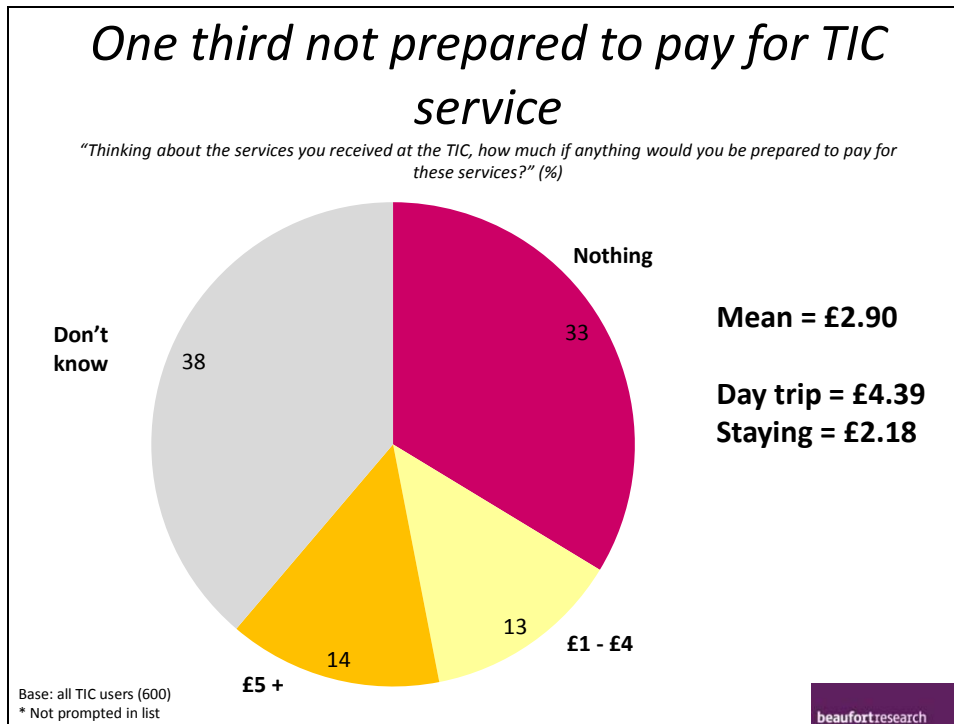
Chart 11



Those who were on a day trip were most likely to rate the information from the TIC as important in getting the most out of their trip – most likely because they were limited in terms of time and the recommended information would have played a greater part in their trip as a whole compared to someone on a longer staying trip.

When asked whether they would be prepared to pay for the services that they received from the TIC an overwhelming majority of TIC users either said they would not be prepared to pay anything, or that they were not able to put a value to the information they were given.

Chart 12



The mean value that respondents gave (including those who said “nothing”) was £2.90. This ranged from £4.39 for those on a day trip down to £2.18 for those on a staying trip.

Multiplying these numbers up to the population of visitors gives an estimate of the total user valuation of the TIC’s of £6 million.

4.3 Economic impact modelling

This section sets out the economic impact assessment for TICs. The assessment sets out:

- Direct impacts – the employment within the TIC and the associated Gross Value Added (GVA)
- Indirect impacts:
 - The employment and GVA supported as a result of spend on goods and services by TICs.
 - The employment and GVA supported by visitor spending as a result of information received from TICs.

These estimates are based upon two strands of work:

1. Information collected from TICs in Wales on employment and expenditure data.
2. The visitor survey work discussed earlier in this report.

4.3.1 Area of Benefit

The assessment considers the spatial distribution of the economic impacts at a local and a Wales level. We have used the local area as the main spatial area for this analysis. Note that this is taken to mean the city/town/resort where the TIC is located and the hinterland as defined by the TIC and its visitors.

The method for the economic impact assessment and the key indicators used are set out separately in methodology towards the front of the report.

4.3.2 Direct Impacts

TICs operate with a mix of staffing structures combining full time, part time and casual staff, to provide the level of cover needed. Staffing is higher during the summer months than for the winter period.

Returns from Managing Agents give a total of 122,276 hours worked by all staff over a year, the equivalent of 62.7 full time equivalent (FTE) jobs⁴. On average therefore each TIC employs 2.2⁵ FTE staff. Aggregating up for 56 TICs this is a total FTE employment of 123.2.

⁴ Calculation is: 122,276 hours ÷ 52 weeks ÷ 5 days a week ÷ 7.5 hours a day.

⁵ 62.7 FTEs ÷ 28 TICs

The average cost per TIC staff FTE job (based on budgets for staffing given in the returns) is £21,048. In total, expenditure on TIC staff across the 56 TICs is around £2.6million.

Impacts at local or Wales level

Questionnaire returns indicate whether TIC spend on the different budget headings is made at local level, elsewhere in Wales or elsewhere outside Wales. As might be expected the extent of local expenditure is variable, with the greatest level of local expenditure being on staff costs. Table 1 reports that 93.6% of staff costs are identified as spend in the local area, with 6.4% being spend elsewhere in Wales. No TIC staff costs are spent outside Wales.

Table 1

	% spend in local area	% spend in Wales	% spend outside Wales	% spend location unknown
TIC staff	93.6	6.4	0.0	0.0

Gross Value Added

GVA per employee figure⁶s are used to estimate the gross value added from the activities of TICs on other TIC spend on goods and services and the jobs this supports.

Table 2

Gross GVA generated from direct FTE	Local GVA	GVA elsewhere in Wales	GVA outside Wales/ unknown	Total Gross GVA
TIC Staff FTE	£2,894,030 ⁷	£198,290	£0	£3,092,320

4.3.3 Indirect Impacts

⁶ GVA per employee figure used is £25,100

⁷ Calculation is GVA per employee x 'Number of FTEs' x spend in local area i.e. 25,100 * 123.2 * 0.936

The average spend per TIC, derived from the returns, is £69,698. The total spend of 56 TICs is therefore around £3.9 million.

FTE impacts of TIC spend on goods and services

A significant proportion of TIC spend is attributable to staff costs (66.4%) discussed above. TIC spend on other goods and services (33.6%)⁸ covers:

- Purchase of stock (16.7%)
- Consumables such as stationery (1.5%)
- TIC accommodation costs – rent, rates, utilities (10.6%)
- Other services e.g. cleaning (1.2%)
- Insurances (0.3%)
- Equipment costs (0.6%)
- Other costs e.g. uniforms (2.7%)

The total (non-staff) spend of £1,309,900 will support jobs with suppliers, Using an average of £103,900 turnover supporting one FTE and also including multiplier effects, this level of spend would support 16.4 FTEs⁹.

TIC spend on goods and services impacts at local or Wales level

Questionnaire returns indicate whether TIC spend on the different budget headings is made at local level, elsewhere in Wales or elsewhere outside Wales. As might be expected the extent of local expenditure is variable. Table 3 summarises the proportion of spend by category for all TIC spend on goods and services.

⁸ Some returns indicated that some elements of expenditure such as insurances are undertaken through central purchasing and not part of TIC budgets/unknown to Managing Agents. There may be some element of under representation of budgets.

⁹ Calculation: (Total spend ÷ average turnover) x jobs multiplier of 1.3. i.e. £1,309,000/£103,900 x 1.3

Table 3

	% spend in local area	% spend in Wales	% spend outside Wales	% spend location unknown
Stock for sale	39.7	46.6	13.7	0.0
Consumables	47.8	33.0	10.0	9.3
Rent/Rates/Utilities	63.9	9.1	17.3	9.7
Other services	93.4	6.6	0.0	0.0
Insurances*	0.0	21.9	17.4	60.6
Equipment*	16.7	50.1	4.4	28.8
Other*	54.0	9.9	15.4	20.7

*note that these categories were not completed in all returns; for example some authorities purchase these through central purchasing systems which managing agents are not party to. These figures are therefore based on a more limited response.

Applying these proportions to non-TIC staff expenditure by category (averaged for all TICs) and the FTEs this might generate¹⁰ indicates that the gross jobs impacts of TIC activities (other than staffing) would be 12.6 FTE. This is summarised in table 4.

Table 4

Gross FTEs	Local employment	Employment in Wales	Employment outside Wales/unknown
Total FTE	6.3	3.7	2.6

*note that figures may not sum due to rounding.

¹⁰ Using the average turnover figure of £103,900 supporting one FTE

Gross Value Added from TIC spend on Goods and Services

GVA per employee figures are used to estimate the gross value added from the activities of TICs on other TIC spend on goods and services and the jobs this supports.

Table 5

Gross GVA generated from FTEs	Local GVA	GVA elsewhere in Wales	GVA outside Wales/ unknown	Gross GVA
Other TIC spend on goods and services FTE	£150,220 ¹¹	£88,220	£61,990	£300,430

Additionality from TIC Operations

In terms of additionality, the following assumptions are made:

- Leakage; spend outside Wales is viewed as leakage and is therefore be discounted from economic impacts
- Deadweight; is viewed as zero as it is assumed that nothing would have happened if the TICs were not in place
- Displacement; is viewed as zero as it is assumed that managing agents have allocated the TIC budget for TIC purposes. It is therefore not displacing other services

On this basis employment outside Wales is viewed as leakage and not therefore an economic impact from TICs for Wales. The FTE employment where location is not known has also been discounted as leakage for the purposes of this economic assessment.

¹¹ This calculation uses an average GVA per employee of £23,844. Calculation is GVA per employee x number of FTEs i.e £23,844 x 6.3

Multipliers have also been applied:

- There is an indirect impact arising from spend on staff costs through the further downstream effects on jobs by the spending of TIC staff (indirect/induced FTEs). This is estimated at 24.7 FTE jobs¹². Of this 23.1 FTEs are generated in the local area and the remaining 1.6 FTEs elsewhere within Wales
- There is an indirect impact arising from further downstream effects of TIC spend on other goods and services. This is estimated at 3.8 FTEs¹³ of which 1.9 are generated in the local area, 1.1 FTEs elsewhere in Wales and 0.8 FTEs outside Wales.

Net employment impacts for Wales from TIC activities can therefore be summarised:

Table 6

Net FTE (direct & indirect/induced)	Local employment	Employment elsewhere in Wales	Total employment in Wales
Direct TIC Staff FTE	115.3	7.9	123.2
Indirect/induced TIC staff FTE	23.1	1.6	24.7
Other TIC spend on goods and services FTE	8.2	4.8	13
Net FTE	146.6	14.3	160.9

¹² Using a multiplier of 1.2

¹³ Using a multiplier of 1.3

Net GVA generated in Wales is £4.02 million of which 91% is generated within the local area of the TIC (largely because of the local nature of TIC staff employment), as set out in the following table:

Table 7

Net GVA generated from FTEs	Local GVA	GVA elsewhere in Wales	Total GVA in Wales
TIC Staff FTE	£2,894,030	£198,290	£3,092,320
TIC Staff indirect/induced FTE	£577,300	£40,160	£617,460
Other TIC spend on goods and services FTE	£195,520	£114,450	£309,970
Net GVA	£3,666,850	£352,900	£4,019,750

Assessment of the Indirect Economic Impact of Information provided by Tourist Information Centre to Visitors

In 2011 there were 3.8 million enquirers at TICs in Wales¹⁴. These enquirers received information about accommodation, places to visit (commercial attractions, events, local shops and other facilities) and things to do (paid for activities, eating and drinking). The provision of this information results in economic activity.

Using the recorded number of visits to TICs and making the necessary adjustments for local residents' use¹⁵ and group size, and using the spend estimates from the survey¹⁶ it is estimated that the total gross expenditure in the local area associated with the information received from TICs in Wales is £67 million, supporting almost 1,500 jobs. The Gross Value Added (GVA) associated with this employment is estimated to be £37million.

¹⁴ In person and via other channels.

¹⁵ The spend by local residents is not considered an input to the economy and so is excluded from the analysis

¹⁶ Visitor survey results indicated an average gross additional spend per visitor group to the TIC of £109

However a considerable amount of this expenditure would have happened anyway, is likely to leak out of the local area of benefit, or relate to a switching of activity within the area of benefit. In addition there will be additional impacts resulting from the spend of the people employed in the visitor-facing businesses and from the business purchase of goods and services. The scale of adjustment varies between different activities and to a lesser extent, between different areas of Wales.

Using the study specific adjustments for deadweight, leakage and displacement¹⁷, and multipliers from the 2007 Wales Tourism Satellite Accounts, it is estimated that the net additional expenditure associated with the information received from the TICs is £20 million. This is estimated to support 444 FTEs with an associated GVA of £12.5 million. The table below sets out the gross and net impacts expressed as spend, FTEs and GVA.

¹⁷ Based on the responses to the TIC visitor survey – deadweight from Q10c; leakage from Qs 11, 17, 21, 24, 27 & 30; and displacement from Qs 15, 19, 23, 26, 29 & 32

Table 8**Summary of Economic Impacts from Tourist Information Centre Information**

Overall Summary	Wales	North Wales	SE Wales	SW Wales	Mid Wales
Gross total visitor spend as a result of TIC information	£ 67,125,040	£29,074,290	£6,615,075	£23,655,650	£7,780,025
Gross spend per group as a result of TIC information	£109	£120	£39	£178	£117
Gross FTEs supported	1,489	645	147	525	173
Gross GVA generated	£37,361,980	£16,182,830	£3,681,970	£13,166,800	£4,330,380
Net total additional visitor spend as a result of TIC information	£20,035,210	£8,209,530	£1,436,450	£8,213,280	£2,175,945
Net additional spend per group as a result of TIC information	£33	£34	£8	£62	£33
Net additional FTEs supported	444	182	32	182	48
Net additional GVA generated	£12,452,680	£5,102,550	£892,810	£ 5,104,880	£1,352,440

Table 8 above and Chart 13 below also show how the different regions of Wales contribute to the total. The differences between regions will result from the different levels of TIC use, the proportion of users who are local and the types of enquiry and the extent to which the information received results in new activity. The earlier review of the survey findings sets out the detail of these aspects.

Chart 13

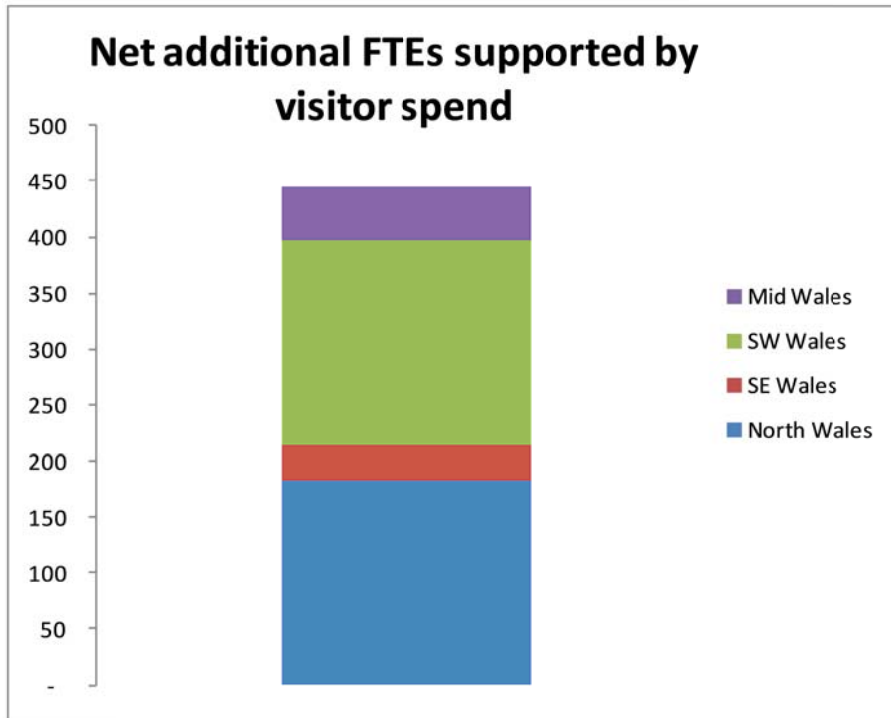


Chart 14 below shows how the different activities that TICs provided information for contribute to the overall economic impact. The key contributors are attractions and local facilities, followed by events. Accommodation is also important, particularly as it is only part of staying visitor's visits.

Chart 14

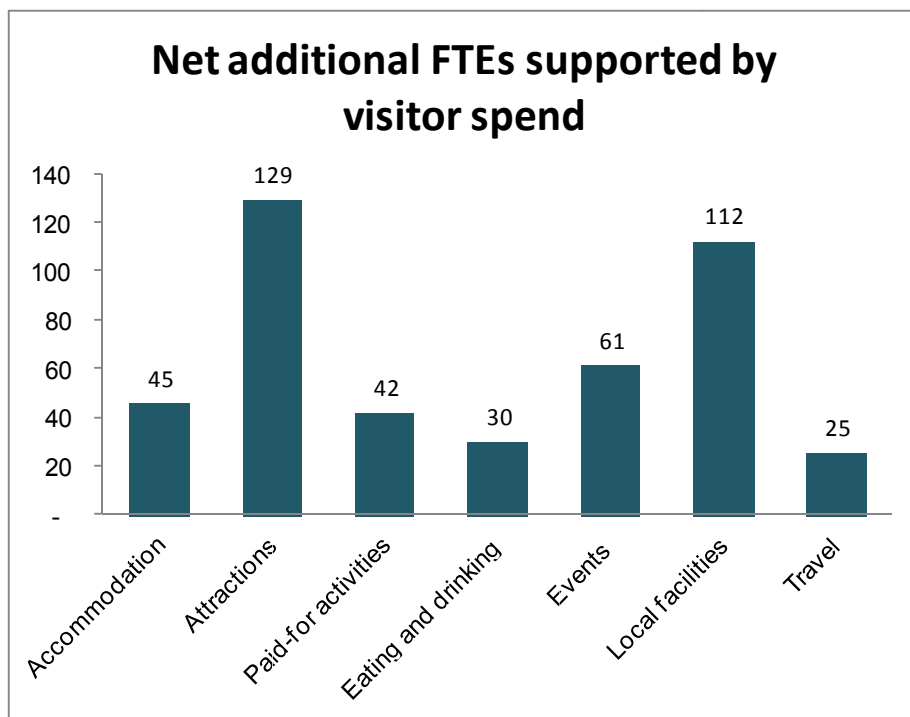


Table 9 sets out spend and GVA per inquiry at the TIC. This indicates a gross spend per inquiry of £17.49. By way of comparison, the average spend per night of staying visitors to Wales is £50 and the average day visitor spend is £29. Once additionality is taken into account, then the net additional spend per enquiry is reduced to £5.22. Net GVA per enquiry is £3.24.

Table 9

	Wales	North Wales	SE Wales	SW Wales	Mid Wales
Gross spend/inquiry	£17.49	£20.81	£4.90	£31.49	£24.16
Gross GVA/inquiry	£9.73	£11.58	£2.73	£17.53	£13.45
Net additional spend/inquiry	£5.22	£5.88	£1.07	£10.93	£6.76
Net additional GVA/inquiry	£3.24	£3.65	£0.66	£6.80	£4.20

4.3.4 Overall Summary

Drawing the economic impacts from both strands of analysis together the gross and net additional impacts are:

Gross impacts

The gross economic impact of TICs for Wales can be summarised as:

- 1,622 FTEs supported
- £40.7 million of GVA generated

Of these, 123 FTEs and £3.09 million GVA are generated directly; and 1,499 FTEs and £37.6 million GVA are generated indirectly (by TIC operations and visitor expenditure).

Net additional impacts

Some of the gross impacts would have happened anyway, or likely to leak out of the local area of benefit, or relate to a switching of activity within the area of benefit. In addition there will be multiplier impacts from successive rounds of spending in the local economy. Adjusting the figures to take account of these factors the net additional local economic impact of TICs for Wales can be summarised as:

- 605 FTEs supported
- £16.47 million of GVA generated

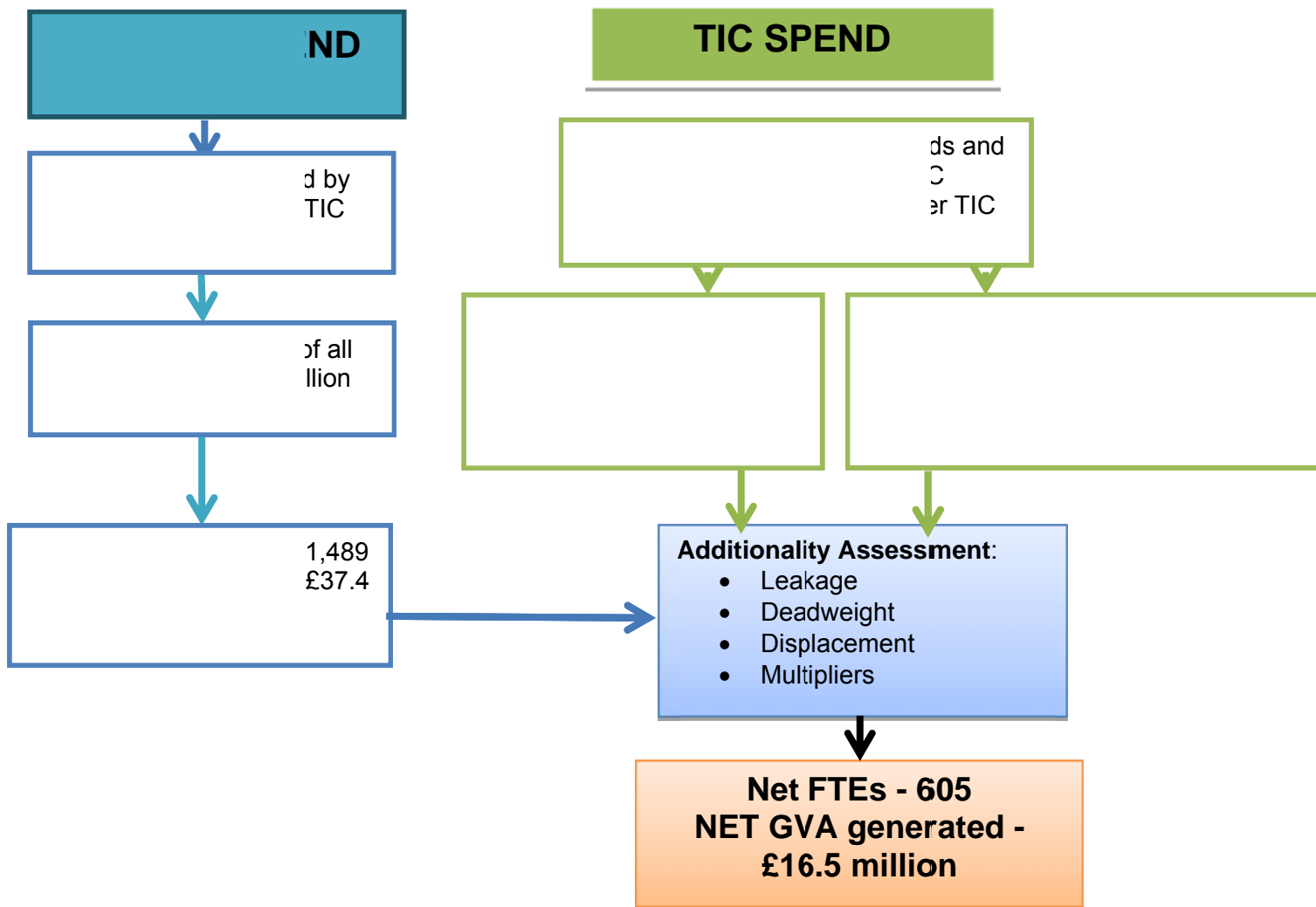
Of these, 148 net additional FTEs and £3.7 million of GVA are generated directly; and 457 net additional FTEs and £12.76 million of GVA are generated indirectly (by TIC operations and visitor expenditure).

Table 10

Impact*	Total	Direct – TIC Operation	Indirect – TIC Operation	Indirect – Visitor Spend
Gross FTEs	1,622	123	10	1,489
Gross GVA	£40.7 million	£3.1 million	£0.25 million	£37.4 million
Net Additional FTEs	605	148	13	444
Net Additional GVA	£16. 5 million	£3.7 million	£0.3 million	£12.5 million

* figures are rounded to one decimal place.

To conclude, we summarise the net additional impacts based on our economic impact methodology.



APPENDIX

QUESTIONNAIRE USED FOR TIC USERS

**TIC ECONOMIC IMPACT CATI SCRIPT – FINAL
(B01251)**

Good afternoon/ evening my name is _____ from Beaufort Research, an independent market research agency and member of the Market Research Society. We are conducting a survey among visitors to Wales who used a tourist information centre. Could you spare me a few minutes to answer some questions about your experience with the tourist information centre – the answers you give will be kept confidential. As a thank you for taking part I will enter you into a prize draw for the chance to win a hamper of Welsh produce to the value of £100.

Q1	Can I just check, with regards to your recent trip in Wales did you visit a tourist information centre in #INSERT LOCATION# in person or contact them by telephone or email?	<p style="text-align: right;">By phone 1 → Q2 By email 2 → Q2 Visit 3 → Q3 Don't recall using a tourist information service Close</p>
Q2	And since your telephone call/ email to the tourist information centre, have you taken a trip in Wales?	<p style="text-align: right;">Yes 1 → Q3 No 2 Close</p>
Q3	Would you like to take part in this survey in English or Welsh?	<p style="text-align: right;">English 1 Welsh 2</p>
Q4	In which country is your main place of residence? READ OUT are you...	<p style="text-align: right;">A local resident (living within 10 miles of the tourist information centre) 1 From elsewhere in Wales 2 Rest of UK (including Northern Ireland) 3 Europe 4 Rest of World 5</p>
Q5	During your recent trip in Wales when you used the tourist information centre service were you on a day trip in Wales or staying overnight? If staying overnight was that in Wales or outside Wales.	<p style="text-align: right;">Day trip 1 → Q9 Staying overnight in Wales 2 → Q6 Staying overnight outside Wales 2 → Q9</p>

Q6	<p>(IF STAYING OVERNIGHT IN WALES) Which type of accommodation were you staying in? READ OUT</p> <p>Paid accommodation (including camping and caravan sites) 1 With friends or relatives (or in their accommodation) 2 In your own accommodation (such as second home) 3</p>	
Q7	<p>What type of trip were you on – a holiday or a short break? READ OUT</p> <p>A holiday 1 A short break 2 Other 3</p>	
Q8	<p>How many nights did you stay in Wales during that trip? RECORD NUMBER _____</p>	
Q9	<p>ASK ALL Including yourself, how many people were in your immediate party during your recent trip in Wales? RECORD NUMBER ADULTS _____ RECORD NUMBER CHILDREN (AGED 0-16) _____</p>	
Q10a	<p>Thinking about your recent contact with #INSERT TIC NAME# which of the following areas, if any, did you obtain information on for the visit? We are only interested those that are <u>in Wales</u>. ROTATE LIST Multiple choice</p> <p>Accommodation 1 Attractions to visit 2 Paid activities (such as kayaking, horse riding, boat trips) 3 Places to eat and drink 4 Events (such as sports events, festivals, fairs, markets) 5 Local Facilities (shopping/leisure centres/theatre/cinema/library/local park) 6 Transport and travel 7 Other (specify) _____ 8 →Q35 Can't remember 9 →Q35</p>	
Q10b	<p>And which areas did you visit/ book/ go to as a <u>direct result of information obtained from the tourist information centre</u>? ONLY SHOW THOSE CHOSEN AT Q10a Multiple choice</p> <p>Accommodation 1 Attractions to visit 2 Paid activities (such as kayaking, horse riding, boat trips) 3 Places to eat and drink 4 Events (such as sports events, festivals, fairs, markets) 5 Local Facilities (shopping/leisure centres/theatre/cinema/library/local park) 6 Transport and travel 7 None 8 →Q39 Can't remember 9 →Q39</p>	
Q10c	<p>How likely is it that you would have visited/booked/gone to these if you had <u>not</u> received information about them from the tourist information centre? Would you</p>	

definitely have visited anyway, probably have visited, probably not have visited or definitely not have visited?

ONLY SHOW THOSE CHOSEN AT Q10b

Definitely would have visited, probably would have visited, probably would not have visited, definitely would not have visited, don't know

- Accommodation
- Attractions to visit
- Paid activities (such as kayaking, horse riding, boat trips) 1
- Places to eat and drink 2
- Events (such as sports events, festivals, fairs, markets) 3
- Local Facilities (shopping/leisure centres/theatre/cinema/library/local park) 4
- Transport and travel 5
- 6
- 7

ACCOMMODATION (if code 1 at Q10b)

Q11	<p>(IF OBTAINED INFO ON ACCOMMODATION IN WALES) Where was the accommodation that you obtained information on... READ OUT – SINGLE CODE</p> <p style="text-align: right;">Within the local area of the tourist information centre 1 Elsewhere in Wales 2</p>	
Q12	<p>Did you actually book the accommodation through the TIC?</p> <p style="text-align: right;">Yes 1 No 2</p>	
Q13	<p>How many nights of your accommodation did you book as a result of the information received from or booking made at the tourist information centre? RECORD NUMBER _____</p>	
Q14	<p>What was the total cost of the accommodation that you booked as a result of information received from or booking made at the tourist information centre? IF DON'T KNOW/ CAN'T REMEMBER please give best estimate. RECORD NUMBER _____</p>	

Q15	If you had not made the booking using the information received from the tourist information centre or made at the tourist information centre, what do you think you would have done instead? READ OUT	
	Stayed elsewhere in the local area	1
	Stayed elsewhere in Wales	2
	Stayed elsewhere outside Wales	3
	Not stayed overnight	4
	Other (specify) _____	5
	Don't know	6

ATTRACTIONS TO VISIT (if code 2 at Q10b)

Q16	<p>(IF OBTAINED INFO ON ATTRACTIONS TO VISIT IN WALES)</p> <p>How many attractions did you visit in Wales based on a referral/ information from the tourist information centre?</p> <p>RECORD NUMBER _____</p>	
Q17	<p>And of these, how many were in the area local to the tourist information centre?</p> <p>RECORD NUMBER _____</p>	
Q18	<p>How much did you spend in total on all the attraction(s) that you got information on at the tourist information centre? Please include spend across your immediate party on all elements including entry fee, parking, catering and purchases.</p> <p>IF DON'T KNOW/ CAN'T REMEMBER please give best estimate.</p> <p>RECORD NUMBER _____</p>	
Q19	<p>If you had not visited the attraction/s, what do you think you would have done instead? READ OUT</p> <p>Stayed at home/ in holiday accommodation</p> <p>General sightseeing</p> <p>Paid for activity</p> <p>Visited other attraction/s</p> <p>Gone shopping</p> <p>Other (specify) _____</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p>

PAID ACTIVITIES (if code 3 at Q10b)

<p>Q20</p>	<p>(IF OBTAINED INFO ON PAID ACTIVITIES TO TAKE PART IN, IN WALES) How many paid activities did you take part in based on referral/information that you received from the tourist information centre... RECORD NUMBER</p>	
<p>Q21</p>	<p>And, of these, how many were in the area local to the tourist information centre? RECORD NUMBER</p>	
<p>Q22</p>	<p>How much in total did your immediate party spend on all the paid activities that you got information on via the tourist information centre? IF DON'T KNOW/ CAN'T REMEMBER please give best estimate. RECORD NUMBER _____</p>	
<p>Q23</p>	<p>If you had not taken part in the paid activities, what do you think you would have done instead? READ OUT</p>	<p>Stayed at home/ in holiday accommodation 1 General sightseeing 2 Other paid for activities 3 Visited attraction/s 4 Gone shopping 5 Other (specify) _____ 6</p>

PLACES TO EAT AND DRINK IN WALES (if code 4 at Q10b)

<p>Q24</p>	<p>(IF OBTAINED INFO ON PLACES TO EAT AND DRINK IN WALES) Were the places to eat and drink that you visited as a result of information received from the tourist information centre... READ OUT. MAY MULTICODE</p>	
<p>Q25</p>	<p>How much in total did your immediate party spend in the places to eat and drink? IF DON'T KNOW/ CAN'T REMEMBER please give best estimate. RECORD NUMBER _____</p>	<p>Within the local area of the tourist information centre 1 Elsewhere in Wales 2</p>

Q26	<p>If you had not visited these places to eat and drink, what do you think you would have done instead? READ OUT</p> <p style="padding-left: 40px;">Found somewhere else to eat and drink in the local area</p> <p style="padding-left: 40px;">Found somewhere else to eat and drink elsewhere in Wales</p> <p style="padding-left: 80px;">Eaten at home/ at accommodation</p> <p style="padding-left: 80px;">Other (specify) _____</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p>
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EVENTS (if code 5 at Q10b)

Q27	<p>(IF OBTAINED INFO ON EVENTS IN WALES)</p> <p>Were the events that you visited as a result of information received from the tourist information centre... READ OUT. MAY MULTICODE</p> <p style="padding-left: 40px;">Within the local area of the tourist information centre</p> <p style="padding-left: 80px;">Elsewhere in Wales</p>	<p>1</p> <p>2</p>
Q28	<p>How much in total did your immediate party spend at the events you visited? Please include spend on tickets, catering and any purchases as well as parking.</p> <p>IF DON'T KNOW/ CAN'T REMEMBER please give best estimate.</p> <p>RECORD NUMBER _____</p>	
Q29	<p>If you had not visited an event, what do you think you would have done instead? READ OUT</p> <p style="padding-left: 40px;">Stayed at home/ in holiday accommodation</p> <p style="padding-left: 80px;">General sightseeing</p> <p style="padding-left: 80px;">Paid for activity</p> <p style="padding-left: 80px;">Visited an attraction</p> <p style="padding-left: 80px;">Shopping</p> <p style="padding-left: 80px;">Other (specify) _____</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p>

LOCAL FACILITIES (if code 6 at Q10b)

<p>Q30</p>	<p>(IF OBTAINED INFO ON LOCAL FACILITIES) Were the local facilities (such as shops, leisure centres, theatres, cinemas, markets etc) that you visited as a result of information received from the tourist information centre... READ OUT. MAY MULTICODE</p> <p style="text-align: right;">Within the local area of the tourist information centre 1 Elsewhere in Wales 2</p>	
<p>Q31</p>	<p>How much did your immediate party spend across all the local facilities used as a direct result of the information from the tourist information centre? Please include spend on tickets, catering and any purchases as well as parking.</p> <p>IF DON'T KNOW/ CAN'T REMEMBER please give best estimate.</p> <p>RECORD NUMBER _____</p>	
<p>Q32</p>	<p>If you had not visited the local facilities, what do you think you would have done instead? READ OUT</p> <p style="text-align: right;">Stayed at home/ in holiday accommodation 1 General sightseeing 2 Visited an attraction 3 Paid for activity 4 Other (specify) _____ 5</p>	

TRAVEL AND TRANSPORT (if code 7 at Q10b)

<p>Q33</p>	<p>(IF OBTAINED INFO ON TRAVEL AND TRANSPORT IN WALES) How many additional trips in Wales did you make as a result of the information received from the tourist information centre? RECORD NUMBER</p>	
<p>Q34</p>	<p>How much in total did your immediate party spend on travel and transport in Wales as a result of the information you received from the tourist information centre.</p> <p>IF DON'T KNOW/ CAN'T REMEMBER please give best estimate.</p> <p>RECORD NUMBER _____</p>	

Q35	<p>ASK ALL</p> <p>Other than the tourist information centre what other sources of information did you use? READ OUT – ROTATE LIST. MAY MULTICODE.</p>	<p>Live nearby so already knew</p> <p>Knowledge from previous visit</p> <p>Advice from friends and relatives</p> <p>Guides (e.g. Time Out, Lonely Planet etc)</p> <p>Newspaper or magazine advertisement</p> <p>Advice or recommendation from accommodation provider</p> <p>Website (including Apps) specify _____</p> <p>Other (specify) _____</p> <p>Did not need information</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p>
Q36	<p>How important was the tourist information centre in getting the most out of your recent visit? Please use a scale of 1 – 10 where 1 = not at all important and 10 = very important.</p>	<p>1 2 3 4 5 6 7 8 9 10 Don't know</p>	
Q37	<p>Thinking about the services you received at the tourist information centre how much, if anything, do you think would you be prepared to pay for these services?</p>	<p>IF RANGE RECORD MID POINT</p> <p>RECORD NUMBER _____</p>	
Q38	<p>Did the information you received at the tourist information centre result in you staying longer in Wales?</p>	<p>Yes</p> <p>No</p>	<p>1→Q39a/ b</p> <p>2→Q40</p>
Q39a	<p>(DAY VISITORS ONLY)</p> <p>How much extra time did you stay?</p>	<p>RECORD HOURS _____</p>	
Q39b	<p>(STAYING VISITORS)</p> <p>How many extra days did you stay?</p>	<p>RECORD NUMBER _____</p>	
Q40	<p>Will the information you received from the tourist information centre encourage you to take another trip to Wales in the near future?</p>	<p>Definitely</p> <p>Probably</p> <p>Probably not</p> <p>Definitely not</p> <p>Don't know</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p>

Finally I'd like to ask you some questions to check that our sample is representative.

Q41	RECORD GENDER	Male Female	1 2
Q42	ASK ALL May I ask your age?	Under 24 25-34 35-44 45-54 55-64 65+	1 2 3 4 5 6
Q43	What is the working status of the chief income earner in your household?	Working full time (30+ hours per week) Working part time (8-29 hours per week) Full time education Retired Not working Other	1 2 3 4 5 6
Q44	And what is their occupation? RECORD _____		
Q45	INTERVIEWER RECORD SOCIAL CLASS	AB C1 C2 DE	1 2 3 4

READ OUT

Thank you for taking part in this survey. Would you like to be entered into a prize draw for the chance to win a hamper of Welsh produce to the value of £100?

IF YES, RECORD FULL NAME AND ADDRESS _____

MARKET RESEARCH SOCIETY STATEMENT.

QUESTIONNAIRE USED FOR TIC MANAGING AGENTS

4. What do you spend on Tourist Information Centre goods and services (please either give an actual annual £ figure or % of total annual expenditure, whichever is easier. If you operate more than one TIC, please give the figure for all your TICs)

Goods and Services	£	%
Stock for sale (items that you sell in the TIC)		
Consumables (stationery, toner etc)		
Rent/Rates/Utilities		
TIC staff		
Other services e.g. telephones		
Insurances		
Equipment (e.g. photocopier)		
Postage		

5. Where do you purchase your goods and services from – locally (within 10 miles), within Wales, elsewhere

Goods and Services	Locally %	Within Wales %	Elsewhere %
Stock for sale			
Consumables			
Rent/Rates/Utilities			
TIC staff			
Other services e.g. cleaning			
Insurances			
Equipment (e.g. photocopier)			
Uniform			

Thank you very much for your help.

Please return form to NAME REMOVED no later than 29th August 2012.