

Dadansoddi ar gyfer Polisi



Analysis for Policy

Ymchwil gymdeithasol
Social research

Number: 02/2012

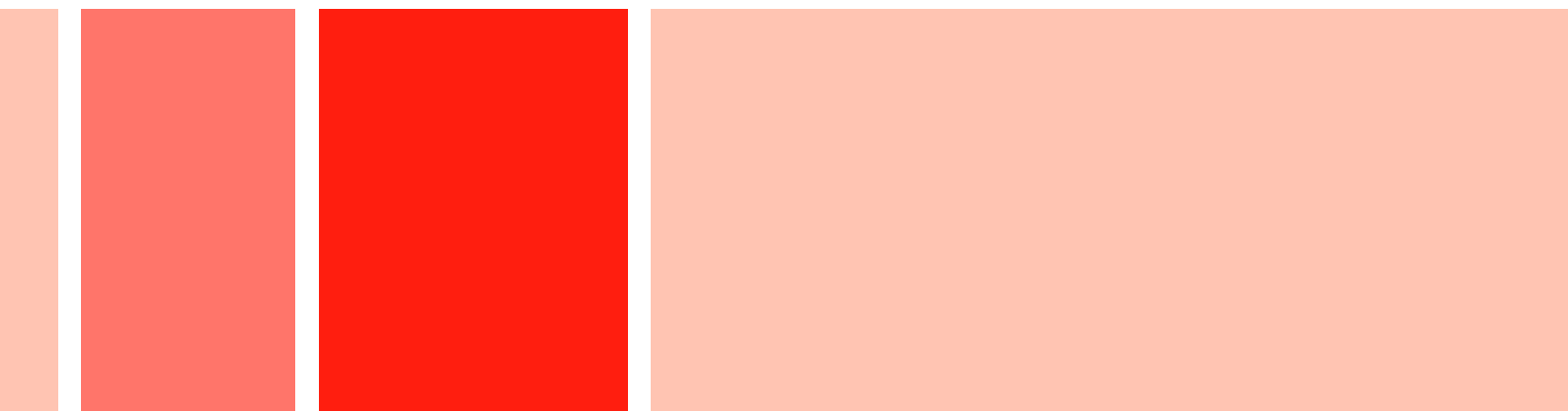


Llywodraeth Cymru
Welsh Government

www.cymru.gov.uk

Wales Visitor Survey 2011

Overseas Visitors - Executive Summary



Wales Visitor Survey 2011: Overseas Visitors Research on behalf of Visit Wales

Claire Peate, Beaufort Research Ltd.

The logo for Beaufort Research, featuring the company name in white lowercase letters on a dark purple rectangular background.

beaufortresearch

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

For further information please contact:

Dr Robert Lewis

Knowledge and Analytical Services

Welsh Government

QED Centre, Treforest Industrial Estate

Pontypridd, Rhondda Cynon Taf, CF37 5YR

Tel: 0300 061 6026

Email: robert.lewis@wales.gsi.gov.uk

Welsh Government Social Research

ISBN 978 0 7504 6942 5

© Crown Copyright 2012

1. INTRODUCTION AND OBJECTIVES

As part of its statutory function to promote, develop and monitor tourism in Wales, Visit Wales undertakes a regular programme of research to provide information on the volume, value and character of tourism in Wales.

In late 2010 Visit Wales commissioned Beaufort Research to conduct a research study amongst overseas and UK Visitors to Wales, both Staying and Day, between April to October 2011. This replicated and updated similar surveys, conducted amongst Staying Visitors in 2000, 2001, 2003, 2006 and Staying and Day Visitors in 2009.

The overall aim of the study was to improve and build upon Visit Wales' understanding of the motivations, needs and behaviours of visitors to Wales.

While the project was commissioned by Visit Wales, and took a Wales-wide view of visitors, several local authorities and two public bodies also took advantage of the research and bought into it by boosting the volume of interviews at particular locations, and adding area-specific questions to the survey in order to measure specific *local* elements of the visitor's experience.

Those buying into the 2011 UK Visitor Survey were:

- Neath Port Talbot County Borough Council
- Powys County Council
- Conwy County Council
- Ceredigion County Council
- CyMAL
- Arts Council of Wales
- Mid Wales Tourism Partnership
- Southern Wales Tourism

This executive summary is concerned with Overseas Visitors to Wales only – findings for UK Day Visitors are UK Staying Visitors reported separately. In addition there is a full report for Overseas Visitors.

2. METHODOLOGY

The research universe for the entire survey was defined as those aged 16 or over, on a trip to/ in Wales either as a Staying or Day Visitor. Those who visited for the purposes of going shopping, attending a routine appointment, on business, or for study were excluded.

- For **Day Visitors** the respondent must have spent three or more hours away from home, including travel.
- For **Staying Visitors**, the respondent must have spent a certain number of nights in Wales, according to the length of their overall stay.

For Staying Visitors, the number of nights they were required to have stayed in order to qualify for interview were:

One night trip	no nights stayed at point of interview
Two-three nights trip	at least one night stayed at point of interview
Four or more nights trip	at least two nights stayed at point of interview

The survey was undertaken by means of a **two-stage** programme. Initially visitors were interviewed face to face (Stage I) at interview points across Wales.

A ten minute questionnaire was administered and a request made to follow-up the exercise with an online interview (Stage II) after the respondent had completed their trip. An invitation to this follow-up online interview was emailed to the respondent 2-3 weeks after their initial interview and a link given to an online survey hosted by Beaufort Research. The reason for adopting the two-stage approach was to enable a wider range of questions to be put to the respondent than would otherwise be possible in a face to face in-street interview.

A total of **4,750** interviews were conducted in Stage I with **675** visitors going on to complete Stage II.

As a result of several local authorities buying into the project and boosting sample volumes in their areas, the final data set was not representative of the universe of visitors to Wales. To address this at the analysis stage, the data was weighted back to reflect the proportions of visitors to Wales at local authority level – delivering a representative sample at a Wales-wide level. The effects of weighting the data are shown in Tables 1a and 1b for both Stages I and II of the research. The dimensions shown correspond with those used in the cross-breaks of the data tabulations.

Where question wording and answer options have been altered between 2009 and 2011 data should be treated with caution: differences may be due to semantic and numeric changes rather than be the result of actual differences. Throughout the report the questions where these changes apply have been highlighted.

3. EXECUTIVE SUMMARY

- A total of **600** face to face interviews were conducted with Overseas Visitors during their trip in Wales between April and September 2011 with an online follow up questionnaire completed by **85** Overseas Visitors after the visit.
- **The profile of Overseas Visitors is heavily skewed towards the ABC1 demographic**, with nearly nine in ten in this group (Table 1). In terms of lifestyle segmentation the largest category is *Empty Nesters* which accounts for a third of Overseas Visitors (Table 2).
- **Over half of all Overseas Visitors are new to Wales:** With a fifth lapsed visitors and a quarter repeat visitors. New Visitors are highest in South Wales (Table 3).
- **Satisfaction with the trip is high:** over a third (37%) rated Wales 10/10 for the attribute *Wales overall as a place to visit*. (Chart 1)
- **Top performing elements of the trip relate to the natural environment and attractions.** Elements that perform less well (but still perform positively) are associated with commercial tourist facilities such as shops and places to eat as well as *value for money*.
- **Over half have mobile internet capability :** just under a third of Overseas Visitors have access to and have used mobile internet to find out things during their trip. (Table 4).
- **The use of websites as information sources prior to the trip is growing:** just over a third consulted a website for information prior to their trip (up from a quarter in 2009). (Table 5).
- **During the trip leaflets at attractions and/or accommodation are the most-mentioned** sources of information with over half using these as information sources. This is followed by *TICs*: used by just over one third of Overseas Visitors. (Table 6).
- **Mid to large hotels** are the most-mentioned accommodation type (with 23% staying in this accommodation), followed by *home of a friend* (14%) and *home of relation* (13%). (Table 7).

Table 1: Socio Economic Group (Stage I)

	UK Profile*	TOTAL		Visitor type		Region visited			
		2011	2009	New/lapsed	Repeat	North	Mid	South	West
ABC1	51%	86%	85%	87%	86%	82%	85%	88%	89%
C2DE	49%	12%	15%	12%	12%	17%	14%	11%	9%
Sample size	-	601	567	448	140	90*	155	251	105

Base: all Overseas Visitors

*Source: Market Research Society 2006, Occupational Groupings (6th Edition).

*Caution: small base

Table 2: Lifestage (Stage I)

	TOTAL		Visitor type		Region visited			
	2011	2009	New/lapsed	Repeat	North	Mid	South	West
Young Independents <i>Aged under 35, no children in household</i>	26%	22%	29%	15%	18%	23%	31%	27%
Older Independents <i>Aged 35-54, no children in household</i>	21%	22%	23%	17%	24%	17%	19%	26%
Families <i>Any children in household</i>	18%	24%	17%	24%	15%	19%	21%	17%
Empty Nesters <i>Aged 55+, no children in household</i>	34%	32%	31%	45%	44%	42%	29%	29%
Sample size	601	567	438	135	89	150	243	103

Base: all Overseas Visitors

*Caution: small base

Table 3: New/ repeat visits (Stage I)

	TOTAL		Region visited			
	2011	2009	North	Mid	South	West
New Visitor	56%	57%	57%	53%	59%	49%
Lapsed Visitor	20%	13%	22%	25%	18%	20%
Repeat Visitor	24%	30%	22%	22%	23%	31%
Sample size	588	556	88*	151	244	105

Base: all Overseas Visitors

*Caution: low base

Chart 1

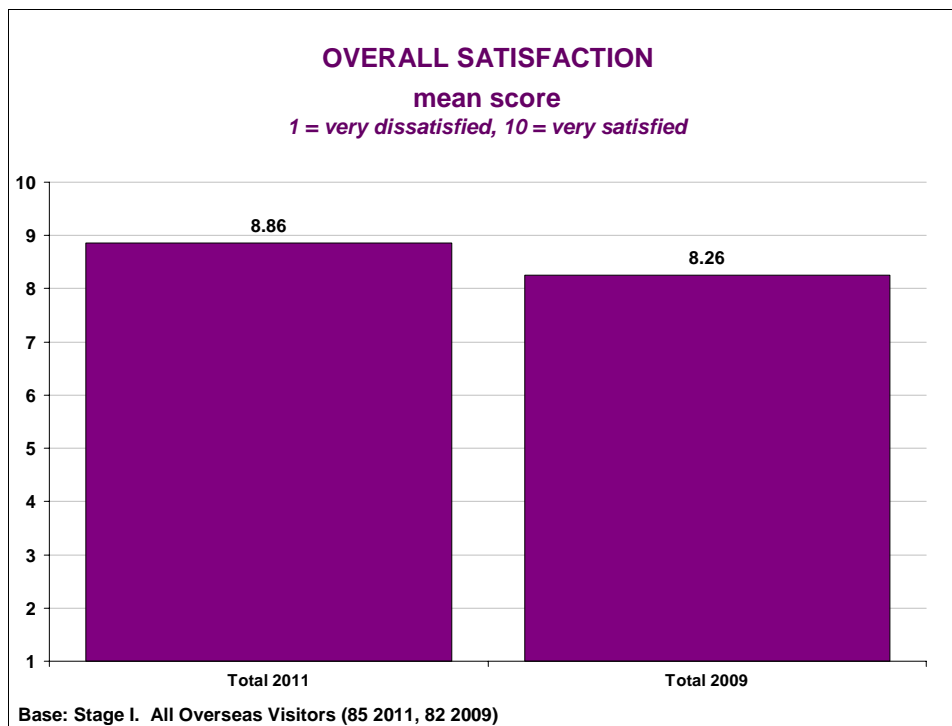


Table 4: Internet access while on trip mobile

	TOTAL	Visitor type		Region visited			
		2011	New/ lapsed	Repeat	North	Mid	South
% having access to the internet via mobile phone/ handheld device while on trip*	55%	58%	51%	54%	41%	59%	57%
% with access <u>and</u> who have used it during their trip	31%	33%	24%	28%	25%	34%	30%
Sample size	601	448	140	90**	155	251	105

*Base: all Overseas Visitors

‡Base: all Overseas Visitors with access to the internet via a mobile/ handheld device

**Caution: small base

Table 5: Source of information before the trip - Stage II data

	TOTAL	
	2011	2009
Knowledge based on previous visit	52%	41%
Advice from friends/ relatives	49%	45%
Website	35%	23%
Information directly from Visit Wales office/ bureau/ TIC	18%	12%
Guides (e.g. Timeout, Lonely Planet, Rough Guide)	12%	31%
Live nearby so already knew	8%	3%
Advice or recommendation from accommodation provider	7%	-
TV, radio, cinema advertisements	4%	1%
Visit to a holiday or travel exhibition/ fair	4%	7%
Advice or recommendation from a travel agent	3%	3%
Tour operator brochure	2%	13%
Other	2%	4%
Did not refer to anything before visit	7%	4%
Mobile phone application	1%	-
Sample size	85*	82*

Base: all Overseas Visitors

*Caution: small base

Table 6: Source of information during the trip - Stage II data

	TOTAL	
	2011	2009
Leaflets at attraction/s or accommodation	52%	75%
Tourist Information Centres	38%	62%
Website(s)	21%	7%
Local newspaper(s)	9%	8%
Other	6%	4%
Directory Enquiries	2%	-
Mobile phone applications	1%	-
Didn't use any	26%	4%
Sample size	85*	82*

Base: all Overseas Visitors

*Caution: small base

Table 7: Type of accommodation used - Stage I data

	TOTAL		Visitor type		Region visited			
	2011	2009	New/ lapsed	Repeat	North	Mid	South	West
Mid to large hotel (11+ rooms)	23%	26%**	27%	11%	19%	11%	26%	27%
Home of friend	14%	16%	11%	22%	1%	13%	20%	17%
Home of relation	13%	18%	8%	28%	8%	14%	16%	15%
Bed and breakfast	12%	12%	13%	11%	13%	15%	10%	15%
Self-catering in house/ cottage	8%	7%	8%	5%	14%	9%	3%	10%
Small hotel (10 rooms or less)	7%	26%**	9%	2%	8%	13%	7%	2%
Campsite	5%	7%	6%	1%	13%	7%	1%	1%
Guesthouse	4%		5%	2%	8%	5%	3%	2%
Hostel	3%	4%	4%	0%	4%	1%	4%	1%
Towed caravan	2%	-	2%	2%	3%	2%	2%	0%
Self-catering in apartment/ flat	2%	-	2%	3%	3%	1%	2%	1%
Owned static caravan	1%	-	1%	2%	4%	1%	0%	0%
Rented/ static caravan	1%	2%	0%	3%	3%	1%	0%	0%
Hired caravan/ chalet	1%	-	1%	2%	0%	1%	1%	3%
Farmhouse	1%	2%	0%	2%	1%	2%	0%	1%
University accommodation	1%	1%	1%	0%	0%	0%	2%	0%
Holiday park/ centre (not in caravan)	1%	1%	0%	2%	1%	0%	0%	1%
Other	2%	3%	2%	3%	0%	4%	2%	5%
Sample size	559	542	415	136	79*	151	227	102

Base: all Overseas Visitors

*Caution: small base

**Hotels not split out by size in 2009

Table 8: Mean scores – satisfaction with trip dimensions (during the visit)

Stage I data

	TOTAL		Visitor type		Region visited			
	2011	2009	New/ lapsed	Repeat	North	Mid	South	West
Friendliness of people	9.32	9.10	9.29	9.40	9.23	9.47	9.42	9.13
Quality of the natural environment	9.22	-	9.21	9.24	9.16	9.48	9.17	9.27
Wales overall as a place to visit	8.97	-	8.90	9.13	8.88	9.01	9.05	8.86
Attractions and places to visit	8.90	8.72	8.85	9.06	8.75	9.04	9.05	8.69
Cleanliness of the general environment	8.84	-	8.86	8.75	8.91	9.14	8.79	8.67
Visitor information during your trip	8.61	-	8.55	8.81	8.52	8.88	8.62	8.52
Standard of tourist signposting	8.28	-	8.24	8.37	8.41	8.43	8.19	8.21
Shopping	8.24	7.66	8.20	8.34	7.74	8.25	8.71	7.63
Places to eat and drink	8.13	8.14	8.12	8.14	8.02	8.17	8.41	7.61
Overall value for money	8.12		8.06	8.29	7.98	8.19	8.33	7.79
Sample size	601	567	448	140	90*	155	251	105

Base: all Overseas Visitors

*Caution: small base

Caution: ratings scales have changed between 2009 and 2011.